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AUTHOR Forrest, Melanie D.

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ABSTRACT

This curriculum guide is intended for Missouri teachers teaching a course in database applications for high school students enrolled in marketing and cooperative education. The curriculum presented includes learning activities in which students are taught to analyze database tables containing the types of data typically encountered by employees responsible for maintaining inventory records, customer data, salesperson data, purchase order information, and information about customer purchases. Each learning activity is presented in the form of a detailed lesson plan containing some or all of the following: learner outcome; competencies; Missouri Show-Me Standard(s) (knowledge and performance standards) addressed; objective; steps entailed in competing the learning activity; activity sheet; and answer key. The following topics are covered in the learning activities included: completing purchase order forms; completing invoices; completing inventory transactions; determining cumulative discounts for customers; defining discount terms; determining cash discounts for customers; analyzing customer invoice payments; completing inventory return transactions; determining return procedures for customers; determining reorder procedures; calculating stock turnover; determining defects and missing stock; determining seasonal discounts for customers; analyzing customer purchases; analyzing strategies to increase sales; developing a sales incentive program; and developing sales goals. (MN)

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TENNIS SHOE TOWN
Marketing & Cooperative Education Database Application Unit

DATABASE APPLICATIONS FOR MARKETING OPERATIONS AND SELLING UNITS

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A Marketing and Cooperative Education Database Application Unit

June 1998

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Advisory Committee

Cheryl Yung, Warrensburg Area Vocational-Technical School
Beth Deering, Waynesville Technical Academy
Mary Worthington, Hannibal Area Vocational-Technical School
Gaya Wallace, School of the Osage High School
Janell Allred, Clinton Area Vocational School
Nancy Krider, Lake Area Vocational-Technical School
Susan Pashia, Owensville High School
Wayne Smith, Parkway West High School
Nancy Dreisinger, Central Bank

Writer

Melanie D. Forrest, Business Instructor, David H. Hickman High School

Associate Editor

Melanie D. Forrest, Business Instructor, David H. Hickman High School

Marketing and Cooperative Education Staff
Department of Elementary and Secondary Education

Gene Reed, Director
Julie Lyman, Supervisor
Hattie Jenkins, Secretary

Marketing Education Faculty
University of Missouri-Columbia

Allen D. Truell, Project Director and Editor

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Introduction

Many marketing careers revolve around the use and manipulation of data. Future marketing education students need to obtain the skills to analyze data using database applications. The use of computers is a growing trend in marketing, and database application software is being used by most businesses. It is essential that the marketing education student keep current with the uses of technology and the benefits of manipulating data in an efficient and meaningful manner.

The *"Database Applications for the Marketing and Cooperative Education"* curriculum is designed to teach students how to analyze, read and retrieve data that is relevant to the marketing professional. This curriculum can be used by itself or in conjunction with the database application software program, Microsoft Access, Version 97 using a Windows 95 operating system. A diskette of the database files needed to complete a large portion of the exercises is provided with this curriculum. The software component is only another tool for instruction. This project is designed to support instruction in marketing operations and selling.

In order to better understand the advantages of teaching marketing education students how to manipulate database applications, participants must be able to clearly define the term "database." A database is a collection of similar data for a variety of fields. Databases are comprised of records of information. A record is the similar data for an individual component. For example, many businesses maintain their personnel files using database application software. Each employee would represent a *record.* Within each *record* is a list of *fields* pertaining to the *record.* Thus, each employee's name, address, city, state, zip code, telephone number, hire date and social security number would represent individual fields of information. A sample database table is illustrated below.

Em-ployee	Address	City	State	ZipCode	HireDate	SocSecNo
Ann Jones	222 Washington	St. Louis	MO	62314	11/9/99	888-88-8888
Bill Smith	101 Main Street	Jefferson City	MO	65102	10/2/98	999-99-9999

Records represented above: *All information for Ann Jones and Bill Smith*

Fields for Each Record above: *Employee, Address, City, State, Zip Code, Hire Date, Social Security Number*

Database information relating to marketing education can be created to maintain inventory records, customer data, salesperson data, purchase order information, customer purchases and any other collection of data deemed necessary for marketing departments. The curriculum provided in this guide illustrates the use of a variety of databases. Students will be asked to analyze and update database tables. Enrichment activities have been included in several activities. Using the database software diskette provided will also provide enrichment for the marketing student. Additional database concepts can be taught using the software program. Attractive forms for viewing and reports for printing may be created by the marketing student for all of the activities within this curriculum guide.

Answer keys to the assessment instruments are also included within this guide. In some instances, the only acceptable response from students will be the accurate completion of the activity. Students who do not complete the activity correctly should be allowed to remediate until the correct response is achieved. The assessment instruments are designed to expose students to the growing arena of database technology. The use of database applications should complement the current curriculum in marketing operations and selling units of study.

Database Application Software Information

There are thirteen database tables needed to complete the activities. The database tables are listed below and are organized by database cateogories on the diskette included with this curriculum.

Database Application Table Categories on the Diskette:

- Purchase Orders
- Customers
- Inventory
- Employees

Database Application Tables - Organized by Activity Name:

Activity 1 ..... Purchase Order Database I
Activity 2 ..... Purchase Order Database II
Activity 3 ..... Purchase Order Database II, Customer Database
Activity 4 ..... Customer Database, Inventory Database I
Activity 5 ..... Customer Database, Inventory Database II
Activity 6 ..... Purchase Order Database II
Activity 7 ..... Purchase Order Database II
Activity 8 ..... None
Activity 9 ..... Inventory Database II, High/Low/Baby Top Customer Purchases I
Activity 10 ..... High/Low/Baby Top Customer Purchases II
Activity 11 ..... Inventory Database II
Activity 12 ..... Inventory Database II
Activity 13 ..... Inventory Database II
Activity 14 ..... Inventory Database III
Activity 15 ..... High/Low/Baby Top Customer Purchases II
Activity 16 ..... Inventory Database III
Activity 17 ..... Inventory Database III
Activity 18 ..... Employee Database

This unit does not require students to use the software. Using the database software diskette provided only provides enrichment for the marketing student. Additional database concepts can be taught using the software program.

TENNIS SHOE TOWN
Marketing & Cooperative Education
Database Application Unit

MARKETING OPERATIONS
DATABASE APPLICATIONS
SECTION

Process purchase/payment forms and records

Activity 1

Learner Outcome

E5. Process purchase/payment forms and records

Competencies

E5b. Completing Purchase Orders

Show-Me Standards

Knowledge: (MA1) addition, subtraction, multiplication and division; other number sense, including numeration and estimation; and the application of these operations and concepts in the workplace and other ituations.

Performance: (1.4) use technological tools and other resources to locate, select and organize information.
(1.9) assess costs, benefits and other consequences of proposed solutions

Objective

Students will be able to accurately fill out a purchase order form given the purchasing information.

Activity 1

- Step 1: Access the Purchase Order Database

- Step 2: Fill out five more purchase orders based on the following transactions. Use 12/1/99 for the ordered date unless otherwise stated.

- Step 3: Note the following shipping charges per purchase: Speedy Shipping charges $1.00 per Baby Tops; $2.00 per Low Tops; $3.00 per High Tops. Speedy Shipping can ship items within 1-2 days. Federal Shipping charges 50 cents less than Speedy Shipping for each item and ships items within 3-5 days.

    1. Margaret Peacock sold 57 high tops to customer no. 3 via a phone order. Promised them in three days on 12/4/99 to the customer who needs them two days later. Use Speedy Express to ship them. Ship Date: 12/2/99

    2. Customer no. 2 needs double her past order of baby tops. Use the same shipping method and time span as last order. A. Fuller was out of town for sale. J. Leverling took the mail order. Ship Date: 12/15/99

Process purchase/payment forms and records

3. Customer no. 4 needs another bi-weekly supply of same shoes ordered before. Use correct date and same shipping method. Salesperson is S. Buchanan. Order request was via mail. Ship Date: 12/3/99

Activity 1

4. Nancy Davolio sold more high tops to Alice Smith for the month. Alice placed order through the mail. Use dates like last month. Wants the save money on shipping. Ship Date: 12/20/99

5. J. Leverling's customer from 12/1 /99 received baby tops on 12/15/99. She received another call on 12/25/99 for another order of high tops. The customer wants 25 shoes sent with 3 days. Ship Date: 12/26/99.

- Step 4: Fill out the purchase order forms needed from the transactions in Part 1.
- Step 5: Turn in your purchase order forms for assessment.

ACTIVITY 1
PURCHASE ORDER DATABASE

CustNo	Cust Name/ Co	PO No	PO Description	Product No	Product	SupplierCo	Ordered	ShipDate	Date Received	EmpDate	ShipCo	Quantity	Price	Freight	Discount	Salesperson	MailOrder	TaxOrder
2	Philips Shoes	137	Weekly Supplies	2	TNT Low Tops	Low Tops Co	11/5/99	11/26/99	11/13/99	11/11/99	Speedy Express	7	$28.00	$14.00	3/10 net 30	Fuller, Andrew	Yes	No
3	Allison Shoes	139	Monthly Order	3	TNT Baby Tops	Chebera Co	11/18/99	11/21/99	12/1/99	11/19/99	Speedy Express	20	$8.00	$20.00	2/10 net 30	Davolio, Nancy	No	Yes
5	Smith Shoes	138	Monthly Order	1	TNT High Tops	High Tops Co	11/5/99	12/1/99	12/1/99	11/28/99	Speedy Express	23	$38.00	$69.00	1/10 net 15	Leverling, Janet	No	Yes
1	Homes Shoes	136	Quarterly Order	1	TNT High Tops	High Tops Co	10/17/99	12/25/99	12/11/99	12/9/99	Federal Shipping	11	$38.00	$27.50	1/10 net 30	Peacock, Margaret	No	Yes
4	Jones Shoes	140	Bi-weekly Supplies	2	TNT Low Tops	Low Tops Co	11/23/99	11/26/99	11/26/99	11/25/99	Speedy Express	34	$28.00	$68.00	1/10 net 10	Buchanan, Steven	Yes	No
2	Philips Shoes	141	Supplies	3	TNT Baby Tops	Chebera Co	11/27/99	12/6/99	12/10/99	12/8/99	Federal Shipping	15	$8.00	$7.50	3/10 net 30	Fuller, Andrew	No	Yes
		142																
		143																
		144																
		145																
		146																

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ACTIVITY 1 - ANSWER KEY
PURCHASE ORDER DATABASE

CustNo	Cus-tomer Co.	PO No.	PO Description	Product No.	Product	SupplierCo	Ordered	DateReq	Date Promised	Ship-Date	ShipCo	Quantity	Price	Freight	Discount	Salesperson	MailOrder	Tele-Order
2	Phillips Shoes	137	Weekly Supplies	2	TNT Low Tops	Low Tops Co.	11/5/99	11/28/99	11/13/99	11/11/99	Speedy Express	7	$28.00	$14.00	3/10 net 30	Fuller, Andrew	Yes	No
3	Wilson Shoes	139	Monthly Order	3	TNT Baby Tops	Children's Co.	11/18/99	11/21/99	1/21/99	11/19/99	Speedy Express	20	$8.00	$20.00	2/10 net 30	Davolio, Nancy	No	Yes
5	Smith Shoes	138	Monthly Order	1	TNT High Tops	High Tops Co.	11/5/99	12/1/99	12/1/99	11/28/99	Speedy Express	23	$38.00	$69.00	1/10 net 15	Levering, Janet	No	Yes
1	Yarres Shoes	136	Quarterly Order	1	TNT High Tops	High Tops Co.	10/17/99	12/25/99	12/11/99	12/9/99	Federal Shipping	11	$38.00	$27.50	1/10 net 30	Peacock, Margaret	No	Yes
4	Jones Shoes	140	Bi-weekly Supplies	2	TNT Low Tops	Low Tops Co.	11/23/99	11/28/99	11/28/99	11/26/99	Speedy Express	34	$28.00	$68.00	1/10 net 15	Buchanan, Steven	Yes	No
2	Phillips Shoes	141	Supplies	3	TNT Baby Tops	Children's Co.	11/27/99	12/9/99	12/10/99	12/8/99	Federal Shipping	15	$8.00	$7.50	3/10 net 30	Fuller, Andrew	No	Yes
3	Wilson Shoes	142	Monthly Order	1	TNT High Tops	High Tops Co.	12/1/99	12/6/99	12/4/99	12/2/99	Speedy Express	57	$38.00	$171.00	2/10 net 30	Peacock, Margaret	No	Yes
2	Phillips Shoes	143	Supplies	3	TNT Baby Tops	Children's Co.	12/1/99	12/14/99	12/15/99	12/15/99	Federal Shipping	30	$8.00	$15.00	3/10 net 30	Levering, Janet	Yes	No
4	Jones Shoes	144	Bi-weekly Supplies	2	TNT Low Tops	Low Tops Co.	12/1/99	12/6/99	12/6/99	12/3/99	Speedy Express	34	$28.00	$68.00	1/10 net 15	Buchanan, Steven	Yes	No
5	Smith Shoes	145	Monthly Order	1	TNT High Tops	High Tops Co.	12/1/99	12/26/99	12/26/99	12/20/99	Federal Shipping	23	$38.00	$57.50	1/10 net 15	Davolio, Nancy	Yes	No
2	Phillips Shoes	146	Supplies	3	TNT Baby Tops	Children's Co.	12/25/99	12/28/99	12/28/99	12/26/99	Speedy Express	25	$8.00	$25.00	3/10 net 30	Levering, Janet	No	Yes

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Process purchase/payment forms and records

Learner Outcome

E5. Process purchase/payment forms and records

Competencies

E5c. Complete packing slips and invoices

Show-Me Standards

Knowledge: (MA1) addition, subtraction, multiplication and division; other number sense, including numeration and estimation; and the application of these operations and concepts in the work-place and other situations.

Performance: (1.4) use technological tools and other resources to locate, select and organize information.
(1.9) assess costs, benefits and other consequences of proposed solutions

Objective

Students will determine the criteria for a packing slip and create packing slips using a generic form.

Activity 2

- Step 1: Use the Purchase Orders Database for P.O. No. 142-146 to fill out a sample packing slip.
- Step 2: Turn in your packing slips for assessment.

Enrichment Activity:

- Using a word processing or desktop publishing software program, design the above packing slip. Present your slip to the class.

ACTIVITY 2
PURCHASE ORDER DATABASE

CustNo	Customer Co.	PO No.	PO Description	Product No.	Product	SupplierCo	Ordered	DateReq	Date Promised	ShipDate	ShipCo	Quantity	Price	Freight	Discount	Salesperson	MailOrder	TeleOrder
2	Phillips Shoes	137	Weekly Supplies	2	TNT Low Tops	Low Tops Co.	11/5/99	11/28/99	11/13/99	11/11/99	Speedy Express	7	$28.00	$14.00	3/10 net 30	Fuller, Andrew	Yes	No
3	Wilson Shoes	139	Monthly Order	3	TNT Baby Tops	Children's Co.	11/18/99	11/21/99	1/21/99	11/19/99	Speedy Express	20	$8.00	$20.00	2/10 net 30	Davolio, Nancy	No	Yes
5	Smith Shoes	138	Monthly Order	1	TNT High Tops	High Tops Co.	11/5/99	12/1/99	12/1/99	11/28/99	Speedy Express	23	$38.00	$69.00	1/10 net 15	Levering, Janet	No	Yes
1	Yorres Shoes	136	Quarterly Order	1	TNT High Tops	High Tops Co.	10/17/99	12/25/99	12/11/99	12/9/99	Federal Shipping	11	$38.00	$27.50	1/10 net 30	Peacock, Margaret	No	Yes
4	Jones Shoes	140	Bi-weekly Supplies	2	TNT Low Tops	Low Tops Co.	11/23/99	11/28/99	11/28/99	11/26/99	Speedy Express	34	$28.00	$68.00	1/10 net 15	Buchanan, Steven	Yes	No
2	Phillips Shoes	141	Supplies	3	TNT Baby Tops	Children's Co.	11/27/99	12/9/99	12/10/99	12/8/99	Federal Shipping	15	$8.00	$7.50	3/10 net 30	Fuller, Andrew	No	Yes
3	Wilson Shoes	142	Monthly Order	1	TNT High Tops	High Tops Co.	12/1/99	12/6/99	12/4/99	12/2/99	Speedy Express	57	$38.00	$171.00	2/10 net 30	Peacock, Margaret	No	Yes
2	Phillips Shoes	143	Supplies	3	TNT Baby Tops	Children's Co.	12/1/99	12/14/99	12/15/99	12/15/99	Federal Shipping	30	$8.00	$15.00	3/10 net 30	Levering, Janet	Yes	No
4	Jones Shoes	144	Bi-weekly Supplies	2	TNT Low Tops	Low Tops Co.	12/1/99	12/6/99	12/6/99	12/3/99	Speedy Express	34	$28.00	$68.00	1/10 net 15	Buchanan, Steven	Yes	No
5	Smith Shoes	145	Monthly Order	1	TNT High Tops	High Tops Co.	12/1/99	12/26/99	12/26/99	12/20/99	Federal Shipping	23	$38.00	$57.50	1/10 net 15	Davolio, Nancy	Yes	No
2	Phillips Shoes	146	Supplies	3	TNT Baby Tops	Children's Co.	12/25/99	12/28/99	12/28/99	12/26/99	Speedy Express	25	$8.00	$25.00	3/10 net 30	Levering, Janet	No	Yes

ACTIVITY 2
CUSTOMER DATABASE

Cust No.	Cust. Name	Billing Address	City	State	Postal Code	Phone Number	Prefer Purchase OnSale	Purchased When
1	Yorres Shoes	87 Polk St., Suite 5	Jefferson City	MO	65109-0087	573-555-5938	Yes	Spring
2	Phillips Shoes	2743 Bering Street	Springfield	MO	66119-2743	417-555-7584	No	Spring
3	Wilson Shoes	2817 Milton Drive	Columbia	MO	65201-2817	573-555-5939	Yes	Winter
4	Jones Shoes	134 Apple Ave.	Columbia	MO	65202-0134	573-555-1155	No	Summer
5	Smith Shoes	9754 Sky Drive	Kansas City	MO	62119-0077	816-555-1098	Yes	Summer
6	James Shoes	77 Pearle Drive	St.Louis	MO	62119-0077	314-555-9933	Yes	Winter

TENNIS SHOE TOWN

305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Packing Slip

SALESPERSON NAME	ORDER DATE	CUSTOMER P.O. NO.	CURRENT DATE	CHECKED BY

SOLD TO	SHIP TO

SHIPPED VIA	TERMS	DATE SHIPPED	SPECIAL INSTRUCTIONS

PRODUCT NO.	ORDERED	SHIPPED	BACK ORDER	U/M	DESCRIPTION	UNIT PRICE	NET

PLEASE NOTE CONDITIONS FOR RETURNED GOODS

1. All claims must be made within 5 days after receipt of goods.
2. Merchandise returned must be in resaleable condition, including original packaging.
3. Returns may be subject to restocking and/or other charges.
4. Exchanges can only be made for incorrect items shipped or defects.

Thank you for your order.

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ACTIVITY 2 - ANSWER KEY
PACKING SLIPS

TENNIS SHOE TOWN

305 - 14th Ave. S.
Suite 3B

Packing Slip

SALESPERSON NAME	ORDER DATE	CUSTOMER P.O. NO.	CURRENT DATE	CHECKED BY
Peacock, Margaret	12/1/99	142	student inserts date	student initals here

SOLD TO	SHIP TO
Wilson Shoes 2817 Milton Drive Columbia, MO 65201-2817	Wilson Shoes 2817 Milton Drive Columbia, MO 65201-2817

SHIPPED VIA	TERMS	DATE SHIPPED	SPECIAL INSTRUCTIONS
Speedy Express	2/10 net 30	12/2/99	none

PRODUCT NO.	ORDERED	SHIPPED	BACK ORDER	U/M	DESCRIPTION	UNIT PRICE	NET
1	57	57	0	PAIR	TNT HIGH TOPS	38.00	2166.00

PLEASE NOTE CONDITIONS FOR RETURNED GOODS

1. All claims must be made within 5 days after receipt of goods.
2. Merchandise returned must be in resaleable condition, including original packaging.
3. Returns may be subject to restocking and/or other charges.

Thank you for your order.

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ACTIVITY 2 - ANSWER KEY
PACKING SLIPS

TENNIS SHOE TOWN

305 - 14th Ave. S.
Suite 3B

Packing Slip
PAGE 1

SALESPERSON NAME	ORDER DATE	CUSTOMER P.O. NO.	CURRENT DATE	CHECKED BY
Leverling, Janet	12/1/99	143	student inserts date	student initals here

SOLD TO	SHIP TO
Phillips Shoes 2743 Bering Street Springfield, MO 66119-2743	Phillips Shoes 2743 Bering Street Springfield, MO 66119-2743

SHIPPED VIA	TERMS	DATE SHIPPED	SPECIAL INSTRUCTIONS
Federal Shipping	3/10 net 30	12/15/99	none

PRODUCT NO.	ORDERED	SHIPPED	BACKORDER	U/M	DESCRIPTION	UNIT PRICE	NET
3	30	30	0	PAIR	TNT BABY TOPS	8.00	240.00

PLEASE NOTE CONDITIONS FOR RETURNED GOODS

1. All claims must be made within 5 days after receipt of goods.
2. Merchandise returned must be in resaleable condition, including original packaging.
3. Returns may be subject to restocking and/or other charges.

Thank you for your order.

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ACTIVITY 2 - ANSWER KEY
PACKING SLIPS

TENNIS SHOE TOWN

305 - 14th Ave. S.
Suite 3B

Packing Slip

SALESPERSON NAME	ORDER DATE	CUSTOMER P.O. NO.	CURRENT DATE	CHECKED BY
Buchanan, Steven	12/1/99	144	student inserts date	student initals here

SOLD TO	SHIP TO
Jones Shoes 134 Apple Avenue Columbia, MO 65202-0134	Jones Shoes 134 Apple Avenue Columbia, MO 65202-0134

SHIPPED VIA	TERMS	DATE SHIPPED	SPECIAL INSTRUCTIONS
Speedy Express	1/10 net 30	12/3/99	none

PRODUCT NO.	ORDERED	SHIPPED	BACK ORDER	U/M	DESCRIPTION	UNIT PRICE	NET
2	34	34	0	PAIR	TNT LOW TOPS	28.00	952.00

PLEASE NOTE CONDITIONS FOR RETURNED GOODS

1. All claims must be made within 5 days after receipt of goods.
2. Merchandise returned must be in resaleable condition, including original packaging.
3. Returns may be subject to restocking and/or other charges.

Thank you for your order.

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ACTIVITY 2 - ANSWER KEY
PACKING SLIPS

TENNIS SHOE TOWN

305 - 14th Ave. S.
Suite 3B

Packing Slip

PAGE 1

SALESPERSON NAME	ORDER DATE	CUSTOMER P.O. NO.	CURRENT DATE	CHECKED BY
Davolio, Nancy	12/1/99	145	student inserts date	student initals here

SOLD TO	SHIP TO
Smith Shoes 9754 Sky Drive Kansas City, MO 62119-0077	Smith Shoes 9754 Sky Drive Kansas City, MO 62119-0077

SHIPPED VIA	TERMS	DATE SHIPPED	SPECIAL INSTRUCTIONS
Federal Shipping	1/10 net 30	12/20/99	none

PRODUCT NO.	ORDERED	SHIPPED	BACK ORDER	U/M	DESCRIPTION	UNIT PRICE	NET
1	23	23	0	PAIR	TNT HIGH TOPS	38.00	874.00

PLEASE NOTE CONDITIONS FOR RETURNED GOODS

1. All claims must be made within 5 days after receipt of goods.
2. Merchandise returned must be in resaleable condition, including original packaging.
3. Returns may be subject to restocking and/or other charges.

Thank you for your order.

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ACTIVITY 2 - ANSWER KEY
PACKING SLIPS

TENNIS SHOE TOWN

305 - 14th Ave. S.
Suite 3B

Packing Slip

PAGE 1

SALESPERSON NAME	ORDER DATE	CUSTOMER P.O. NO.	CURRENT DATE	CHECKED BY
Leverling, Nancy	12/25/99	146	student inserts date	student initals here

SOLD TO
Phillips Shoes
2743 Bering Street
Springfield, MO 66119-2743

SHIP TO
Phillips Shoes
2743 Bering Street
Springfield, MO 66119-2743

SHIPPED VIA	TERMS	DATE SHIPPED	SPECIAL INSTRUCTIONS
Speedy Shipping	3/10 net 30	12/26/99	none

PRODUCT NO.	ORDERED	SHIPPED	BACK ORDER	U/M	DESCRIPTION	UNIT PRICE	NET
3	25	25	0	PAIR	TNT BABY TOPS	8.00	200.00

PLEASE NOTE CONDITIONS FOR RETURNED GOODS

1. All claims must be made within 5 days after receipt of goods.
2. Merchandise returned must be in resaleable condition, including original packaging.
3. Returns may be subject to restocking and/or other charges.

Thank you for your order.

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Process purchase/payment forms and records

Activity 3

Learner Outcome

E5. Process purchase/payment forms and records

Competencies

E5c. Complete packing slips and invoices

Show-Me Standards

Knowledge: (MA1) addition, subtraction, multiplication and division; other number sense, including numeration and estimation; and the application of these operations and concepts in the work-place and other situations.

Performance: (1.4) use technological tools and other resources to locate, select and organize information.
(1.9) assess costs, benefits and other consequences of proposed solutions

Objective

Students will create invoices based on purchase order information with 100% accuracy.

Activity 3

Create Invoices using information from the Purchase Orders and Customer Databases.

- Step 1: Retrieve the Purchase Orders Database.
- Step 2: Retrieve the Customer Database.
- Step 3: Fill in the Invoice Form for Purchase Orders: 136-146. Use the purchase order database for the purchase information. Find the customer addresses in the customer database.
- Step 4: Calculate the total amount due: Add the subtotal to the freight charge, state tax and local tax.
- Step 5: Turn in Invoices for assessment.

ACTIVITY 3
PURCHASE ORDER DATABASE

Custno	Customer Co	PO No	PO Description	Product No	Product	SupplierCo	OrderDate	DateReq	Date Promised	ShipDate	ShipCo	Quantity	Price	Freight	Discount	Salesperson	MailOrder	TeleOrder
2	Phillips Shoes	137	Weekly Supplies	2	TNT Low Tops	Low Tops Co.	11/5/99	11/28/99	11/13/99	11/11/99	Speedy Express	7	$28.00	$14.00	3/10 net 30	Fuller, Andrew	Yes	No
3	Wilson Shoes	139	Monthly Order	3	TNT Baby Tops	Children's Co.	11/18/99	11/21/99	1/21/99	11/19/99	Speedy Express	20	$8.00	$20.00	2/10 net 30	Davolio, Nancy	No	Yes
5	Smith Shoes	138	Monthly Order	1	TNT High Tops	High Tops Co.	11/5/99	12/1/99	12/1/99	11/28/99	Speedy Express	23	$38.00	$69.00	1/10 net 15	Levering, Janet	No	Yes
1	Yanes Shoes	136	Quarterly Order	1	TNT High Tops	High Tops Co.	10/17/99	12/25/99	12/11/99	12/9/99	Federal Shipping	11	$38.00	$27.50	1/10 net 30	Peacock, Margaret	No	Yes
4	Jones Shoes	140	Bi-weekly Supplies	2	TNT Low Tops	Low Tops Co.	11/23/99	11/28/99	11/28/99	11/26/99	Speedy Express	34	$28.00	$68.00	1/10 net 15	Buchanan, Steven	Yes	No
2	Phillips Shoes	141	Supplies	3	TNT Baby Tops	Children's Co.	11/27/99	12/9/99	12/10/99	12/8/99	Federal Shipping	15	$8.00	$7.50	3/10 net 30	Fuller, Andrew	No	Yes
3	Wilson Shoes	142	Monthly Order	1	TNT High Tops	High Tops Co.	12/1/99	12/6/99	12/4/99	12/2/99	Speedy Express	57	$38.00	$171.00	2/10 net 30	Peacock, Margaret	No	Yes
2	Phillips Shoes	143	Supplies	3	TNT Baby Tops	Children's Co.	12/1/99	12/14/99	12/15/99	12/15/99	Federal Shipping	30	$8.00	$15.00	3/10 net 30	Levering, Janet	Yes	No
4	Jones Shoes	144	Bi-weekly Supplies	2	TNT Low Tops	Low Tops Co.	12/1/99	12/6/99	12/6/99	12/3/99	Speedy Express	34	$28.00	$68.00	1/10 net 15	Buchanan, Steven	Yes	No
5	Smith Shoes	145	Monthly Order	1	TNT High Tops	High Tops Co.	12/1/99	12/26/99	12/26/99	12/20/99	Federal Shipping	23	$38.00	$57.50	1/10 net 15	Davolio, Nancy	Yes	No
2	Phillips Shoes	146	Supplies	3	TNT Baby Tops	Children's Co.	12/25/99	12/28/99	12/28/99	12/26/99	Speedy Express	25	$8.00	$25.00	3/10 net 30	Levering, Janet	No	Yes

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ACTIVITY 3
CUSTOMER DATABASE

Cust No.	Cust. Name	Billing Address	City	State	Postal Code	Phone Number	Prefer Purchase OnSale	Purchased When
1	Yorres Shoes	87 Polk St., Suite 5	Jefferson City	MO	65109-0087	573-555-5938	Yes	Spring
2	Phillips Shoes	2743 Bering Street	Springfield	MO	66119-2743	417-555-7584	No	Spring
3	Wilson Shoes	2817 Milton Drive	Columbia	MO	65201-2817	573-555-5939	Yes	Winter
4	Jones Shoes	134 Apple Ave.	Columbia	MO	65202-0134	573-555-1155	No	Summer
5	Smith Shoes	9754 Sky Drive	Kansas City	MO	62119-0077	816-555-1098	Yes	Summer
6	James Shoes	77 Pearle Drive	St.Louis	MO	62119-0077	314-555-9933	Yes	Winter

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INVOICE

TENNIS SHOE TOWN

305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: _____

Customer No. _____

Customer Name: _____ Terms: _____

Address: _____

_____ _____ _____

Salesperson: _____

PONo. _____ Ship Date: _____

Quantity:	Product:	Unit Price:	SubTotal:

SUBTOTAL:	
Freight:	
Sales Tax @ 6.95%	
TOTAL DUE:	

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S.
Suite 3B
Columbia, MO 65203

INVOICE

TENNIS SHOE TOWN
305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 12-9-99
Customer No. 1
Customer Name: Yorres Shoe Terms: 1/10 net 30
Address: 87 Polk Street
Jefferson City, MO 65109-0087
Salesperson: Margaret Peacock
PONo. 136 Ship Date: 12-9-99

11	TNT High Tops	$38.00	$418.00

SUBTOTAL	$418.00
Freight	27.50
Sales Tax @ 6.95%	30.96

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S.
Suite 3B

TOTAL DUE $476.46

INVOICE

TENNIS SHOE TOWN
305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 11-11-99
Customer No. 2
Customer Name: Phillips Shoe Terms: 3/10 net 30
Address: 2743 Bering Street
Springfield, MO 66119-2743
Salesperson: Andrew Fuller
PONo. 137 Ship Date: 11-11-99

7	TNT Low Tops	$28.00	$196.00

SUBTOTAL	196.00
Freight	14.00
Sales Tax @ 6.95%	14.60

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S.
Suite 3B

TOTAL DUE $224.60

INVOICE

TENNIS SHOE TOWN
305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 11-28-99
Customer No. 5
Customer Name: Smith Shoe Terms: 1/10 net 15
Address: 9754 Sky Drive
Kansas City, MO 61149-9754
Salesperson: Janet Leverling
PONo. 138 Ship Date: 11-28-99

23	TNT High Tops	$38.00	$874.00

SUBTOTAL	$874.00
Freight	60.00
Sales Tax @ 6.95%	65.54

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S.
Suite 3B

TOTAL DUE $1008.54

INVOICE

TENNIS SHOE TOWN
305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 11-19-99
Customer No. 3
Customer Name: Wilson Shoes Terms: 2/10 net 30
Address: 2817 Milton Drive
Columbia, MO 65201-2817
Salesperson: Nancy Davalio
PONo. 139 Ship Date: 11-19-99

20	TNT Baby Tops	$8.00	$160.00

SUBTOTAL	$160.00
Freight	20.00
Sales Tax @ 6.95%	12.51

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S.
Suite 3B

TOTAL DUE $192.51

INVOICE

TENNIS SHOE TOWN
305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 11-26-99
Customer No. 4
Customer Name: Bill Jones Terms: 1/10 net 15
Address: 134 Apple Avenue
Columbia, MO 65202-0134
Salesperson: Steven Buchanan
PONo. 140 Ship Date: 11-26-99

34	TNT Low Tops	$28.00	$952.00

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S
Suite 3B

SUBTOTAL	$952.00
Freight	68.00
Sales Tax @ 6.95%	70.89
TOTAL DUE	$ 1090.89

INVOICE

TENNIS SHOE TOWN
305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 12-8-99
Customer No. 2
Customer Name: Rene Phillips Terms: 3/10 net 30
Address: 2743 Bering Street
Springfield, MO 66119-2743
Salesperson: Andrew Fuller
PONo. 141 Ship Date: 12-8-99

15	TNT Baby Tops	$8.00	$120.00

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S
Suite 3B

SUBTOTAL	$120.00
Freight	7.50
Sales Tax @ 6.95%	8.86
TOTAL DUE	$ 136.36

INVOICE

TENNIS SHOE TOWN
305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 12-2-99
Customer No. 3
Customer Name: Wilson Shoes Terms: 2/10 net 30
Address: 2817 Milton Drive
Columbia, MO 65201-2817
Salesperson: Margaret Peacock
PONo. 142 Ship Date: 12-2-99

57	TNT High Tops	$38.00	$2166.00

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S
Suite 3B

SUBTOTAL	$2166.00
Freight	171.00
Sales Tax @ 6.95%	162.42
TOTAL DUE	$ 2499.42

INVOICE

TENNIS SHOE TOWN
305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 12-15-99
Customer No. 2
Customer Name: Phillips Shoes Terms: 3/10 net 30
Address: 2743 Bering Street
Springfield, MO 66119-2743
Salesperson: Janet Leverling
PONo. 143 Ship Date: 12-15-99

30	TNT Baby Tops	$8.00	$240.00

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S
Suite 3B

SUBTOTAL	$240.00
Freight	15.00
Sales Tax @ 6.95%	17.72
TOTAL DUE	$ 272.72

INVOICE

TENNIS SHOE TOWN
305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 12-3-99
Customer No. 4
Customer Name: Jones Shoes Terms: 1/10 net 15
Address: 134 Apple Avenue
Columbia, MO 65202-0134
Salesperson: Steven Buchanon
PONo. 144 Ship Date: 12-3-99

34	TNT Low Tops	$28.00	$952.00

SUBTOTAL	$952.00
Freight	68.00
Sales Tax @ 6.95%	70.89

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S.
Suite 3B

TOTAL DUE $1090.89

INVOICE

TENNIS SHOE TOWN
305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 12-20-99
Customer No. 5
Customer Name: Smith Shoes Terms: 1/10 net 15
Address: 9754 Sky Drive
Kansas City, MO 61149-9754
Salesperson: Margaret Peacock
PONo. 145 Ship Date: 12-20-99

23	TNT High Tops	$38.00	$874.00

SUBTOTAL	$874.00
Freight	57.50
Sales Tax @ 6.95%	64.74

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S.
Suite 3B

TOTAL DUE $996.24

INVOICE

TENNIS SHOE TOWN
305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 12-26-99
Customer No. 2
Customer Name: Phillips Shoes Terms: 3/10 net 30
Address: 2743 Bering Street
Springfield, MO 66119-2743
Salesperson: Janet Leverling
PONo. 146 Ship Date: 12-26-99

25	TNT Baby Tops	$8.00	$200.00

SUBTOTAL	$200.00
Freight	25.00
Sales Tax @ 6.95%	15.64

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S.
Suite 3B

TOTAL DUE $240.64

Manage Inventory

Activity 4

Learner Outcome

E6. Manage Inventory

Competencies

E6f. Check incoming stock and complete stock control records

Show-Me Standards

Knowledge: (MA1) addition, subtraction, multiplication and division; other number sense, including numeration and estimation; and the application of these operations and concepts in the work-place and other situations.

Performance: (1.4) use technological tools and other resources to locate, select and organize information.
(1.9) assess costs, benefits and other consequences of proposed solutions

Objective

Students will be able to complete inventory records from current purchase orders.

Activity 4

- Step 1: Retrieve the Inventory Database.
- Step 2: Retrieve the Purchase Orders Database.
- Step 3: As an employee of Tennis Shoe Town, enter the inventory transactions for the last 5 purchases (P.O.'s 142-146) on the Inventory Database.
- Step 4: Turn in your Inventory Database form for assessment.

ACTIVITY 4
INVENTORY DATABASE

Transaction Date	Product No.	Product	PONo	Description	Price	Customer No	Purchased	Received	Sales	Total Sale	Shrinkage	HTReturns	HTReason	LTReturns	LTReason	BTReturns	BTReason	HTOnHand	LTOnHand	BTOnHand
1/1/99	1	TST High Tops		Supplies	$8.00		100	100										100	100	100
1/1/99	2	TST Low Tops		Supplies	$6.00		100	100										100	100	100
1/1/99	3	TST Baby Tops		Supplies	$2.00		100	100										100	100	100
1/12/99	3	TST Baby Tops	99	Order	$8.00	1	7	7	7	$56.00								100	100	93
1/15/99	1	TST High Tops	100	Order	$38.00	2	34	34	34	$1,292.00								66	100	93
1/30/99	2	TST Low Tops	131	Order	$28.00	3	20	20	20	$560.00								66	80	93
2/2/99	3	TST Baby Tops	102	Order	$8.00	4	23	23	23	$32.00								66	80	70
2/10/99	2	TST Low Tops	103	Order	$28.00	5	28	28	28	$784.00								66	58	70
2/25/99	3	TST Baby Tops		Supplies	$2.00		230	230										66	58	300
3/2/99	1	TST High Tops		Supplies	$8.00		42	42										100	58	300
3/10/99	3	TST Baby Tops	104	Order	$8.00	6	200	200	200	$1600.00								100	58	100
3/21/99	2	TST Low Tops		Supplies	$6.00		30	30										100	100	100
3/22/99	1	TST High Tops		Supplies	$8.00		100	100										200	100	100
3/25/99	1	TST High Tops	105	Order	$38.00	4	100	100	100	$3800.00								100	100	100
3/28/99	2	TST Low Tops		Supplies	$6.00		100	100										100	200	100
3/30/99	2	TST Low Tops	106	Order	$28.00	6	100	100	100	$2800.00								100	100	100
4/1/99	3	TST Baby Tops	107	Order	$8.00	4	25	25	25	$200.00		0		0		0		100	100	75
4/4/99	3	TST Baby Tops		Supplies	$2.00		25	25										100	100	100
4/15/99	3	TST Baby Tops	108	Order	$8.00	1	25	25	25	$200.00		0		0		0		100	100	75
4/17/99	3	TST Baby Tops		Supplies	$2.00		25	25			2							100	100	100
4/28/99	2	TST Low Tops	109	Order	$28.00	3	25	25	25	$700.00		0		0		0		100	75	100
5/1/99	2	TST Low Tops		Supplies	$6.00		25	25										100	100	100
5/28/99	3	TST Baby Tops	110	Order	$8.00	2	50	50	50	$400.00		0		0		0		100	100	50
6/1/99	3	TST Baby Tops		Supplies	$2.00		100	100				0		0		0		100	100	150
6/1/99	2	TST Low Tops		Supplies	$6.00		50	50				0		0		0		100	150	150
6/3/99	3	TST Baby Tops	111	Order	$8.00	3	50	50	50	$400.00		0		0		0		100	100	100
6/8/99	3	TST Baby Tops	112	Order	$8.00	2	50	50	50	$400.00		0		0		0		100	100	50
6/18/99	2	TST Low Tops	113	Order	$28.00	4	50	50	50	$1,400.00		0		0		0		100	50	50
6/21/99	2	TST Low Tops	114	Order	$28.00	6	50	50	50	$1,400.00		0		0		0		100	0	50
6/22/99	2	TST Low Tops		Supplies	$6.00		100	100				0		0		0		100	100	50
6/27/99	2	TST Low Tops	115	Order	$28.00	5	50	50	50	$1,400.00		0		0		0		100	50	50
7/1/99	2	TST Low Tops	116	Order	$28.00	6	50	0	0	$0.00		0		0		0		100	0	50
7/2/99	1	TST High Tops	117	Order	$38.00	1	25	25	25	$950.00		0		0		0		75	0	50
7/2/99	3	TST Baby Tops		Supplies	$2.00		100	100				0		0		0		75	0	150
7/2/99	2	TST Low Tops		Supplies	$6.00		100	0				0		0		0		75	0	150
7/2/99	1	TST High Tops		Supplies	$8.00		175	175				0		0		0		200	0	150
7/3/99	3	TST Baby Tops	118	Order	$8.00	2	25	25	25	$200.00		0		0		0		200	0	125
7/3/99	2	TST Low Tops		BackSupplies	$6.00		0	100				0		0		0		200	100	125

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ACTIVITY 4
INVENTORY DATABASE

Transaction Date	Product No	Product	PONo	Description	Price	Order Number	Qty Shipped	Qty Received	Sales	Total Sale	Backorders	HTNo-sum	HTNo-son	LTNo-sum	LTNo-son	STNo-sum	STNo-son	HTOn-Hand	LTOnHand	STOnHand
1/1/99	1	TST High Tops		Supplies	$8.00		100	100										100	100	100
1/1/99	2	TST Low Tops		Supplies	$6.00		100	100										100	100	100
1/1/99	3	TST Baby Tops		Supplies	$2.00		100	100										100	100	100
1/12/99	3	TST Baby Tops	99	Order	$8.00	1	7	7	7	$56.00								100	100	93
1/15/99	1	TST High Tops	100	Order	$38.00	2	34	34	34	$1,292.00								66	100	93
1/30/99	2	TST Low Tops	131	Order	$28.00	3	20	20	20	$560.00								66	80	93
2/2/99	3	TST Baby Tops	102	Order	$8.00	4	23	23	23	$32.00								66	80	70
2/10/99	2	TST Low Tops	103	Order	$28.00	5	28	28	28	$784.00								66	58	70
2/25/99	3	TST Baby Tops		Supplies	$2.00		230	230										66	58	300
3/2/99	1	TST High Tops		Supplies	$8.00		42	42										100	58	300
3/10/99	3	TST Baby Tops	104	Order	$8.00	6	200	200	200	$1600.00								100	58	100
3/21/99	2	TST Low Tops		Supplies	$6.00		30	30										100	100	100
3/22/99	1	TST High Tops		Supplies	$8.00		100	100										200	100	100
3/25/99	1	TST High Tops	105	Order	$38.00	4	100	100	100	$3800.00								100	100	100
3/28/99	2	TST Low Tops		Supplies	$6.00		100	100										100	200	100
3/30/99	2	TST Low Tops	106	Order	$28.00	6	100	100	100	$2800.00								100	100	100
4/1/99	3	TST Baby Tops	107	Order	$8.00	4	25	25	25	$200.00		0		0		0		100	100	75
4/4/99	3	TST Baby Tops		Supplies	$2.00		25	25										100	100	100
4/15/99	3	TST Baby Tops	108	Order	$8.00	1	25	25	25	$200.00		0		0		0		100	100	75
4/17/99	3	TST Baby Tops		Supplies	$2.00		25	25			2							100	100	100
4/28/99	2	TST Low Tops	109	Order	$28.00	3	25	25	25	$700.00		0		0		0		100	75	100
5/1/99	2	TST Low Tops		Supplies	$6.00		25	25										100	100	100
5/28/99	3	TST Baby Tops	110	Order	$8.00	2	50	50	50	$400.00		0		0		0		100	100	50
6/1/99	3	TST Baby Tops		Supplies	$2.00		100	100				0		0		0		100	100	150
6/1/99	2	TST Low Tops		Supplies	$6.00		50	50				0		0		0		100	150	150
6/3/99	3	TST Baby Tops	111	Order	$8.00	3	50	50	50	$400.00		0		0		0		100	100	100
6/8/99	3	TST Baby Tops	112	Order	$8.00	2	50	50	50	$400.00		0		0		0		100	100	50
6/18/99	2	TST Low Tops	113	Order	$28.00	4	50	50	50	$1,400.00		0		0		0		100	50	50
6/21/99	2	TST Low Tops	114	Order	$28.00	6	50	50	50	$1,400.00		0		0		0		100	0	50
6/22/99	2	TST Low Tops		Supplies	$6.00		100	100				0		0		0		100	100	50
6/27/99	2	TST Low Tops	115	Order	$28.00	5	50	50	50	$1,400.00		0		0		0		100	50	50
7/1/99	2	TST Low Tops	116	Order	$28.00	6	50	0	0	$0.00		0		0		0		100	0	50
7/2/99	1	TST High Tops	117	Order	$38.00	1	25	25	25	$950.00		0		0		0		75	0	50
7/2/99	3	TST Baby Tops		Supplies	$2.00		100	100				0		0		0		75	0	150
7/2/99	2	TST Low Tops		Supplies	$6.00		100	0				0		0		0		75	0	150
7/2/99	1	TST High Tops		Supplies	$8.00		175	175				0		0		0		200	0	150
7/3/99	3	TST Baby Tops	118	Order	$8.00	2	25	25	25	$200.00		0		0		0		200	0	125
7/3/99	2	TST Low Tops		BackSupplies	$6.00		0	100				0		0		0		200	100	125

ACTIVITY 4
INVENTORY DATABASE CONTINUED

Transaction Date	Product No	Product	PO No	Description	Price	Cust No	Purchased	Received	Sale #	Total Sale	Ship to Addr #	HT Returns	HT Reason	LT Returns	LT Reason	BT Returns	BT Reason	HT On-Hand	LT On-Hand	BT On-Hand
8/3/99	1	TST High Tops	121	Order	$38.00	3	50	50	50	$1,900.00		0		0		0		125	100	125
8/15/99	2	TST Low Tops	122	Order	$28.00	4	25	25	25	$700.00		0		0		0		125	25	125
8/17/99	1	TST High Tops		Supplies	$8.00		100	100				0		0		0		225	25	125
8/30/99	2	TST Low Tops	123	Order	$28.00	6	25	25	25	$700.00		0		0		0		225	0	125
9/6/99	1	TST High Tops		Supplies	$8.00		25	25	25			0		0		0		250	0	125
9/10/99	2	TST Low Tops		Supplies	$28.00		500	500				0		0		0		250	500	125
9/10/99	1	TST High Tops		Supplies	$38.00		1000	1000				0		0		0		1250	500	125
9/10/99	3	TST Baby Tops		Supplies	$8.00		175	175				0		0		0		1250	500	300
9/11/99	1	TST High Tops	124	Order	$38.00	6	100	100	100	$3800.00		0		0		0		1150	500	300
9/13/99	1	TST High Tops	125	Order	$38.00	5	75	75	75	$2850.00		0		0		0		1100	500	300
9/15/99	1	TST High Tops	126	Order	$38.00	4	50	50	50	$1900.00		0		0		0		1050	500	300
9/16/99	1	TST High Tops	127	Order	$38.00	3	50	50	50	$1900.00		0		0		0		1000	500	300
9/18/99	2	TST Low Tops	128	Order	$28.00	2	50	50	50	$1400.00		0		0		0		1000	450	300
9/22/99	3	TST Baby Tops	129	Order	$8.00	1	50	50	50	$400.00		0		0		0		1000	450	250
9/28/99	2	TST Low Tops	130	Order	$28.00	5	25	25	25	$700.00		0		0		0		1000	425	250
10/1/99	3	TST Baby Tops	131	Order	$8.00	4	50	50	50	$400.00		0		0		0		1000	425	200
10/5/99	1	TST High Tops	132	Order	$38.00	3	25	25	25	$950.00		0		0		0		975	425	200
10/12/99	2	TST Low Tops	133	Order	$28.00	2	25	25	25	$700.00		0		0		0		975	400	200
10/14/99	2	TST Low Tops	134	Order	$28.00	1	50	50	50	$1400.00		0		0		0		975	350	200
10/16/99	2	TST Low Tops	135	Order	$29.00	6	25	25	25	$700.00		0		0		0		975	325	200
10/17/99	1	TST High Tops	136	Order	$38.00	1	11	11	11	$418.00		0		0		0		964	325	200
11/5/99	2	TST Low Tops	137	Order	$29.00	2	7	7	7	$196.00		0		0		0		964	318	200
11/5/99	1	TST High Tops	138	Order	$38.00	5	23	23	23	$874.00		0		0		0		941	318	200
11/18/99	3	TST Baby Tops	139	Order	$8.00	3	20	20	20	$160.00		0		0		0		941	318	180
11/23/99	2	TST Low Tops	140	Order	$28.00	4	34	34	34	$952.00		0		0		0		941	284	180
11/27/99	3	TST Baby Tops	141	Order	$8.00	2	15	15	15	$120.00		0		0		0		941	284	165

ACTIVITY 4
PURCHASE ORDER DATABASE

Quantity	Customer Code	Purchase Order No.	Purchase Order Description	Product No.	Product Name	Manufacturer	Ordered	Deadline	Shipped	Invoiced	Shipped Via	Delivery	Price	Freight	Discount	Salesperson	Mail Order	Web Order
2	Phillips Shoes	137	Weekly Supplies	2	TNT Low Tops	Low Tops Co	11/5/99	11/28/99	11/13/99	11/11/99	Speedy Express	7	$28.00	$14.00	3/10 net 30	Fuller, Andrew	Yes	No
3	Wilson Shoes	139	Monthly Order	3	TNT Baby Tops	Children's Co	11/18/99	11/21/99	1/21/99	11/19/99	Speedy Express	20	$8.00	$20.00	2/10 net 30	Davolio, Nancy	No	Yes
5	Smith Shoes	138	Monthly Order	1	TNT High Tops	High Tops Co	11/5/99	12/1/99	12/1/99	11/28/99	Speedy Express	23	$38.00	$69.00	1/10 net 15	Levering, Janet	No	Yes
1	Torres Shoes	136	Quarterly Order	1	TNT High Tops	High Tops Co	10/17/99	12/25/99	12/11/99	12/9/99	Federal Shipping	11	$38.00	$27.50	1/10 net 30	Peacock, Margaret	No	Yes
4	Jones Shoes	140	Bi-weekly Supplies	2	TNT Low Tops	Low Tops Co	11/23/99	11/28/99	11/28/99	11/26/99	Speedy Express	34	$28.00	$68.00	1/10 net 15	Buchanan, Steven	Yes	No
2	Phillips Shoes	141	Supplies	3	TNT Baby Tops	Children's Co	11/27/99	12/9/99	12/10/99	12/8/99	Federal Shipping	15	$8.00	$7.50	3/10 net 30	Fuller, Andrew	No	Yes
3	Wilson Shoes	142	Monthly Order	1	TNT High Tops	High Tops Co	12/1/99	12/6/99	12/4/99	12/2/99	Speedy Express	57	$38.00	$171.00	2/10 net 30	Peacock, Margaret	No	Yes
2	Phillips Shoes	143	Supplies	3	TNT Baby Tops	Children's Co	12/1/99	12/14/99	12/15/99	12/15/99	Federal Shipping	30	$8.00	$15.00	3/10 net 30	Levering, Janet	Yes	No
4	Jones Shoes	144	Bi-weekly Supplies	2	TNT Low Tops	Low Tops Co	12/1/99	12/6/99	12/6/99	12/3/99	Speedy Express	34	$28.00	$68.00	1/10 net 15	Buchanan, Steven	Yes	No
5	Smith Shoes	145	Monthly Order	1	TNT High Tops	High Tops Co	12/1/99	12/26/99	12/26/99	12/20/99	Federal Shipping	23	$38.00	$57.50	1/10 net 15	Davolio, Nancy	Yes	No
2	Phillips Shoes	146	Supplies	3	TNT Baby Tops	Children's Co	12/25/99	12/28/99	12/28/99	12/26/99	Speedy Express	25	$8.00	$25.00	3/10 net 30	Levering, Janet	No	Yes

ACTIVITY 4 ANSWER KEY
INVENTORY DATABASE

Transaction Date	Product Key	Product	Order	Description	Price	Order Number Key	Pack Ordered	Pack Received	Sales	Total Sales	Beginning	Week 1 Sales	Week 2 Sales	Week 3 Sales	Week 4 Sales	Week 5 Sales	Week 6 Sales	Total On Hand	Ending Inventory	Minimum
1/1/99	1	TST High Tops		Supplies	$8.00		100	100										100	100	100
1/1/99	2	TST Low Tops		Supplies	$6.00		100	100										100	100	100
1/1/99	3	TST Baby Tops		Supplies	$2.00		100	100										100	100	100
1/12/99	3	TST Baby Tops	99	Order	$8.00	1	7	7	7	$56.00								100	100	93
1/15/99	1	TST High Tops	100	Order	$38.00	2	34	34	34	$1,292.00								66	100	93
1/30/99	2	TST Low Tops	131	Order	$28.00	3	20	20	20	$560.00								66	80	93
2/2/99	3	TST Baby Tops	102	Order	$8.00	4	23	23	23	$32.00								66	80	70
2/10/99	2	TST Low Tops	103	Order	$28.00	5	28	28	28	$784.00								66	58	70
2/25/99	3	TST Baby Tops		Supplies	$2.00		230	230										66	58	300
3/2/99	1	TST High Tops		Supplies	$8.00		42	42										100	58	300
3/10/99	3	TST Baby Tops	104	Order	$8.00	6	200	200	200	$1600.00								100	58	100
3/21/99	2	TST Low Tops		Supplies	$6.00		30	30										100	100	100
3/22/99	1	TST High Tops		Supplies	$8.00		100	100										200	100	100
3/25/99	1	TST High Tops	105	Order	$38.00	4	100	100	100	$3800.00								100	100	100
3/28/99	2	TST Low Tops		Supplies	$6.00		100	100										100	200	100
3/30/99	2	TST Low Tops	106	Order	$28.00	6	100	100	100	$2800.00								100	100	100
4/1/99	3	TST Baby Tops	107	Order	$8.00	4	25	25	25	$200.00		0	0	0				100	100	75
4/4/99	3	TST Baby Tops		Supplies	$2.00		25	25										100	100	100
4/15/99	3	TST Baby Tops	108	Order	$8.00	1	25	25	25	$200.00		0	0	0				100	100	75
4/17/99	3	TST Baby Tops		Supplies	$2.00		25	25			2							100	100	100
4/28/99	2	TST Low Tops	109	Order	$28.00	3	25	25	25	$700.00		0	0	0				100	75	100
5/1/99	2	TST Low Tops		Supplies	$6.00		25	25										100	100	100
5/28/99	3	TST Baby Tops	110	Order	$8.00	2	50	50	50	$400.00		0	0	0				100	100	50
6/1/99	3	TST Baby Tops		Supplies	$2.00		100	100				0	0	0				100	100	150
6/1/99	2	TST Low Tops		Supplies	$6.00		50	50				0	0	0				100	150	150
6/3/99	3	TST Baby Tops	111	Order	$8.00	3	50	50	50	$400.00		0	0	0				100	100	100
6/8/99	3	TST Baby Tops	112	Order	$8.00	2	50	50	50	$400.00		0	0	0				100	100	50
6/18/99	2	TST Low Tops	113	Order	$28.00	4	50	50	50	$1,400.00		0	0	0				100	50	50
6/21/99	2	TST Low Tops	114	Order	$28.00	6	50	50	50	$1,400.00		0	0	0				100	0	50
6/22/99	2	TST Low Tops		Supplies	$6.00		100	100				0	0	0				100	100	50
6/27/99	2	TST Low Tops	115	Order	$28.00	5	50	50	50	$1,400.00		0	0	0				100	50	50
7/1/99	2	TST Low Tops	116	Order	$28.00	6	50	0	0	$0.00		0	0	0				100	0	50
7/2/99	1	TST High Tops	117	Order	$38.00	1	25	25	25	$950.00		0	0	0				75	0	50
7/2/99	3	TST Baby Tops		Supplies	$2.00		100	100				0	0	0				75	0	150
7/2/99	2	TST Low Tops		Supplies	$6.00		100	0				0	0	0				75	0	150
7/2/99	1	TST High Tops		Supplies	$8.00		175	175				0	0	0				200	0	150
7/3/99	3	TST Baby Tops	118	Order	$8.00	2	25	25	25	$200.00		0	0	0				200	0	125
7/3/99	2	TST Low Tops		Back Supplies	$6.00		0	100				0	0	0				200	100	125

ACTIVITY 4 ANSWER KEY
INVENTORY DATABASE CONTINUED

Transaction Date	Product No	Product	PO No	Description	Price	Cust No	Purchased	Received	Sales	Total Sales	Shrink & Dam	HT Returns	HT Reason	LT Returns	LT Reason	BT Returns	BT Reason	HT On-Hand	LT On-Hand	BT On-Hand
8/3/99	1	TST High Tops	121	Order	$38.00	3	50	50	50	$1,900.00		0		0		0		125	100	125
8/15/99	2	TST Low Tops	122	Order	$28.00	4	25	25	25	$700.00		0		0		0		125	25	125
8/17/99	1	TST High Tops		Supplies	$8.00		100	100				0		0		0		225	25	125
8/30/99	2	TST Low Tops	123	Order	$28.00	6	25	25	25	$700.00		0		0		0		225	0	125
9/6/99	1	TST High Tops		Supplies	$8.00		25	25	25			0		0		0		250	0	125
9/10/99	2	TST Low Tops		Supplies	$28.00		500	500				0		0		0		250	500	125
9/10/99	1	TST High Tops		Supplies	$38.00		1000	1000				0		0		0		1250	500	125
9/10/99	3	TST Baby Tops		Supplies	$8.00		175	175				0		0		0		1250	500	300
9/11/99	1	TST High Tops	124	Order	$38.00	6	100	100	100	$3800.00		0		0		0		1150	500	300
9/13/99	1	TST High Tops	125	Order	$38.00	5	75	75	75	$2850.00		0		0		0		1100	500	300
9/15/99	1	TST High Tops	126	Order	$38.00	4	50	50	50	$1900.00		0		0		0		1050	500	300
9/16/99	1	TST High Tops	127	Order	$38.00	3	50	50	50	$1900.00		0		0		0		1000	500	300
9/18/99	2	TST Low Tops	128	Order	$28.00	2	50	50	50	$1400.00		0		0		0		1000	450	300
9/22/99	3	TST Baby Tops	129	Order	$8.00	1	50	50	50	$400.00		0		0		0		1000	450	250
9/28/99	2	TST Low Tops	130	Order	$28.00	5	25	25	25	$700.00		0		0		0		1000	425	250
10/1/99	3	TST Baby Tops	131	Order	$8.00	4	50	50	50	$400.00		0		0		0		1000	425	200
10/5/99	1	TST High Tops	132	Order	$38.00	3	25	25	25	$950.00		0		0		0		975	425	200
10/12/99	2	TST Low Tops	133	Order	$28.00	2	25	25	25	$700.00		0		0		0		975	400	200
10/14/99	2	TST Low Tops	134	Order	$28.00	1	50	50	50	$1400.00		0		0		0		975	350	200
10/16/99	2	TST Low Tops	135	Order	$28.00	6	25	25	25	$700.00		0		0		0		975	325	200
10/17/99	1	TST High Tops	136	Order	$38.00	1	11	11	11	$418.00		0		0		0		964	325	200
11/5/99	2	TST Low Tops	137	Order	$28.00	2	7	7	7	$196.00		0		0		0		964	318	200
11/5/99	1	TST High Tops	138	Order	$38.00	5	23	23	23	$874.00		0		0		0		941	318	200
11/18/99	3	TST Baby Tops	139	Order	$8.00	3	20	20	20	$160.00		0		0		0		941	318	180
11/23/99	2	TST Low Tops	140	Order	$28.00	4	34	34	34	$952.00		0		0		0		941	284	180
11/27/99	3	TST Baby Tops	141	Order	$8.00	2	15	15	15	$120.00		0		0		0		941	284	165
12/1/99	1	TST High Tops	142	Order	$38.00	3	57	57	57	$2166.00		0		0		0		884	284	165
12/1/99	3	TST Baby Tops	143	Order	$8.00	2	30	30	30	$240.00		0		0		0		884	284	135
12/1/99	2	TST Low Tops	144	Order	$28.00	4	34	34	34	$952.00		0		0		0		884	250	135
12/1/99	1	TST High Tops	145	Order	$38.00	5	23	23	23	$874.00		0		0		0		861	250	135
12/25/99	3	TST Baby Tops	146	Order	$8.00	2	25	25	25	$200.00		0		0		0		861	250	110

Process purchase/payment forms and records

Learner Outcome

E5. Process purchase/payment forms and records

Activity 5

Competencies

E5e. Analyze discount date and due date to determine the amount of payment on an invoice

Show-Me Standards

Knowledge: (MA1) addition, subtraction, multiplication and division; other number sense, including numeration and estimation; and the application of these operations and concepts in the workplace and other situations.

Performance: (1.4) use technological tools and other resources to locate, select and organize information.
(1.9) assess costs, benefits and other consequences of proposed solutions

Objective

Students will be able to determine the cumulative discounts available to customers based on customer purchasing criteria.

Activity 5

- Step 1: Use the Company Policy on customer discounts to figure the amount of cumulative discounts per customer.

COMPANY POLICY ON CUSTOMER DISCOUNTS:
When the customer's purchase level within one year reaches the following levels, apply a cumulative discount to their future purchases.

# of Items Purchased Needed for Discount	Percentage of Cumulative Discount
100 - 199	2%
200 - 299	5%
300 and above	7%

Process purchase/payment forms & records

- Step 2: Access the Inventory Database and the Customer Database. When will the Tennis Shoe Town customers be eligible for a cumulative discount based on the Company Policy above? (write "none" in blanks that do not apply)

Customer No.	Customer Company Name	Eligibility Date for 2% Discount	Eligibility Date for 5% Discount	Eligibility Date for 7% Discount
1				
2				
3				
4				
5				
6				

- Step 3: Based upon the eligibility dates above, figure the amount of cumulative discount for the Invoices in Activity 3 for Purchase Order No. 142-146.

P.O. No.	Transaction Date	Customer No.	Sub Total Amt.	Cumulative Discount Amt. in $

- Step 4: Turn in your answers for assessment.

Enrichment Activity:

- Compose a letter to be sent to the customers informing them of their discount. Use correct business letter formatting. Check for spelling and grammatical errors. Turn in your final draft with the scoring guide attached to the front.

ACTIVITY 5
INVENTORY DATABASE

Transaction Date	Product No	Product	PONo	Description	Price	Customer No	Purchases	Received	Sales	Total Sale	Shrinkage	HTReturns	HTReason	LTReturns	LTReason	BTReturns	BTReason	HTOnHand	LTOnHand	BTOnHand
1/1/99	1	TST High Tops		Supplies	$8.00		100	100										100	100	100
1/1/99	2	TST Low Tops		Supplies	$6.00		100	100										100	100	100
1/1/99	3	TST Baby Tops		Supplies	$2.00		100	100										100	100	100
1/12/99	3	TST Baby Tops	99	Order	$8.00	1	7	7	7	$56.00								100	100	93
1/15/99	1	TST High Tops	100	Order	$38.00	2	34	34	34	$1,292.00								66	100	93
1/30/99	2	TST Low Tops	131	Order	$28.00	3	20	20	20	$560.00								66	80	93
2/2/99	3	TST Baby Tops	102	Order	$8.00	4	23	23	23	$32.00								66	80	70
2/10/99	2	TST Low Tops	103	Order	$28.00	5	28	28	28	$784.00								66	58	70
2/25/99	3	TST Baby Tops		Supplies	$2.00		230	230										66	58	300
3/2/99	1	TST High Tops		Supplies	$8.00		42	42										100	58	300
3/10/99	3	TST Baby Tops	104	Order	$8.00	6	200	200	200	$1600.00								100	58	100
3/21/99	2	TST Low Tops		Supplies	$6.00		30	30										100	100	100
3/22/99	1	TST High Tops		Supplies	$8.00		100	100										200	100	100
3/25/99	1	TST High Tops	105	Order	$38.00	4	100	100	100	$3800.00								100	100	100
3/28/99	2	TST Low Tops		Supplies	$6.00		100	100										100	200	100
3/30/99	2	TST Low Tops	106	Order	$28.00	6	100	100	100	$2800.00								100	100	100
4/1/99	3	TST Baby Tops	107	Order	$8.00	4	25	25	25	$200.00		0		0		0		100	100	75
4/4/99	3	TST Baby Tops		Supplies	$2.00		25	25										100	100	100
4/15/99	3	TST Baby Tops	108	Order	$8.00	1	25	25	25	$200.00		0		0		0		100	100	75
4/17/99	3	TST Baby Tops		Supplies	$2.00		25	25			2							100	100	100
4/28/99	2	TST Low Tops	109	Order	$28.00	3	25	25	25	$700.00		0		0		0		100	75	100
5/1/99	2	TST Low Tops		Supplies	$6.00		25	25										100	100	100
5/28/99	3	TST Baby Tops	110	Order	$8.00	2	50	50	50	$400.00		0		0		0		100	100	50
6/1/99	3	TST Baby Tops		Supplies	$2.00		100	100				0		0		0		100	100	150
6/1/99	2	TST Low Tops		Supplies	$6.00		50	50				0		0		0		100	150	150
6/3/99	3	TST Baby Tops	111	Order	$8.00	3	50	50	50	$400.00		0		0		0		100	100	100
6/8/99	3	TST Baby Tops	112	Order	$8.00	2	50	50	50	$400.00		0		0		0		100	100	50
6/18/99	2	TST Low Tops	113	Order	$28.00	4	50	50	50	$1,400.00		0		0		0		100	50	50
6/21/99	2	TST Low Tops	114	Order	$28.00	6	50	50	50	$1,400.00		0		0		0		100	0	50
6/22/99	2	TST Low Tops		Supplies	$6.00		100	100				0		0		0		100	100	50
6/27/99	2	TST Low Tops	115	Order	$28.00	5	50	50	50	$1,400.00		0		0		0		100	50	50
7/1/99	2	TST Low Tops	116	Order	$28.00	6	50	0	0	$0.00		0		0		0		100	0	50
7/2/99	1	TST High Tops	117	Order	$38.00	1	25	25	25	$950.00		0		0		0		75	0	50
7/2/99	3	TST Baby Tops		Supplies	$2.00		100	100				0		0		0		75	0	150
7/2/99	2	TST Low Tops		Supplies	$6.00		100	0				0		0		0		75	0	150
7/2/99	1	TST High Tops		Supplies	$8.00		175	175				0		0		0		200	0	150
7/3/99	3	TST Baby Tops	118	Order	$8.00	2	25	25	25	$200.00		0		0		0		200	0	125
7/3/99	2	TST Low Tops		BackSupplies	$6.00		0	100				0		0		0		200	100	125

ACTIVITY 5
INVENTORY DATABASE CONTINUED

Transaction Date	Product No.	Product	PO No	Description	Price	Cust No	Purchased	Received	Sale #	Total Sale	Shipped	HT Returns	HT Reason	LT Returns	LT Reason	BT Returns	BT Reason	HT On Hand	LT On Hand	BT On Hand
8/3/99	1	TST High Tops	121	Order	$38.00	3	50	50	50	$1,900.00		0		0		0		125	100	125
8/15/99	2	TST Low Tops	122	Order	$28.00	4	25	25	25	$700.00		0		0		0		125	25	125
8/17/99	1	TST High Tops		Supplies	$8.00		100	100				0		0		0		225	25	125
8/30/99	2	TST Low Tops	123	Order	$28.00	8	25	25	25	$700.00		0		0		0		225	0	125
9/6/99	1	TST High Tops		Supplies	$8.00		25	25	25			0		0		0		250	0	125
9/10/99	2	TST Low Tops		Supplies	$28.00		500	500				0		0		0		250	500	125
9/10/99	1	TST High Tops		Supplies	$38.00		1000	1000				0		0		0		1250	500	125
9/10/99	3	TST Baby Tops		Supplies	$8.00		175	175				0		0		0		1250	500	300
9/11/99	1	TST High Tops	124	Order	$38.00	8	100	100	100	$3800.00		0		0		0		1150	500	300
9/13/99	1	TST High Tops	125	Order	$38.00	5	75	75	75	$2850.00		0		0		0		1100	500	300
9/15/99	1	TST High Tops	126	Order	$38.00	4	50	50	50	$1900.00		0		0		0		1050	500	300
9/16/99	1	TST High Tops	127	Order	$38.00	3	50	50	50	$1900.00		0		0		0		1000	500	300
9/18/99	2	TST Low Tops	128	Order	$28.00	2	50	50	50	$1400.00		0		0		0		1000	450	300
9/22/99	3	TST Baby Tops	129	Order	$8.00	1	50	50	50	$400.00		0		0		0		1000	450	250
9/28/99	2	TST Low Tops	130	Order	$28.00	5	25	25	25	$700.00		0		0		0		1000	425	250
10/1/99	3	TST Baby Tops	131	Order	$8.00	4	50	50	50	$400.00		0		0		0		1000	425	200
10/5/99	1	TST High Tops	132	Order	$38.00	3	25	25	25	$950.00		0		0		0		975	425	200
10/12/99	2	TST Low Tops	133	Order	$28.00	2	25	25	25	$700.00		0		0		0		975	400	200
10/14/99	2	TST Low Tops	134	Order	$28.00	1	50	50	50	$1400.00		0		0		0		975	350	200
10/16/99	2	TST Low Tops	135	Order	$28.00	8	25	25	25	$700.00		0		0		0		975	325	200
10/17/99	1	TST High Tops	136	Order	$38.00	1	11	11	11	$418.00		0		0		0		964	325	200
11/5/99	2	TST Low Tops	137	Order	$28.00	2	7	7	7	$196.00		0		0		0		964	318	200
11/5/99	1	TST High Tops	138	Order	$38.00	5	23	23	23	$874.00		0		0		0		941	318	200
11/18/99	3	TST Baby Tops	139	Order	$8.00	3	20	20	20	$160.00		0		0		0		941	318	180
11/23/99	2	TST Low Tops	140	Order	$28.00	4	34	34	34	$952.00		0		0		0		941	284	180
11/27/99	3	TST Baby Tops	141	Order	$8.00	2	15	15	15	$120.00		0		0		0		941	284	165
12/1/99	1	TST High Tops	142	Order	$38.00	3	57	57	57	$2166.00		0		0		0		884	284	165
12/1/99	3	TST Baby Tops	143	Order	$8.00	2	30	30	30	$240.00		0		0		0		884	284	135
12/1/99	2	TST Low Tops	144	Order	$28.00	4	34	34	34	$952.00		0		0		0		884	250	135
12/1/99	1	TST High Tops	145	Order	$38.00	5	23	23	23	$874.00		0		0		0		861	250	135
12/25/99	3	TST Baby Tops	146	Order	$8.00	2	25	25	25	$200.00		0		0		0		861	250	110

ACTIVITY 5
CUSTOMER DATABASE

Cust No.	Cust Name	Billing Address	City	State	Postal Code	Phone Number	Prefer Purchase OnSale	Purchased When
1	Yorres Shoes	87 Polk St., Suite 5	Jefferson City	MO	65109-0087	573-555-5938	Yes	Spring
2	Phillips Shoes	2743 Bering Street	Springfield	MO	66119-2743	417-555-7584	No	Spring
3	Wilson Shoes	2817 Milton Drive	Columbia	MO	65201-2817	573-555-5939	Yes	Winter
4	Jones Shoes	134 Apple Ave.	Columbia	MO	65202-0134	573-555-1155	No	Summer
5	Smith Shoes	9754 Sky Drive	Kansas City	MO	62119-0077	816-555-1098	Yes	Summer
6	James Shoes	77 Pearle Drive	St.Louis	MO	62119-0077	314-555-9933	Yes	Winter

Process purchase/payment forms and records

ACTIVITY 5 ASSESSMENT:
Customer Discounts should be figured as follows:

When will the Tennis Shoe Town customers be eligible for a cumulative discount based on the Company Policy above?

Based upon the eligibility dates above, figure the amount of cumulative discount for the Invoices in Activity 3 for Purchase Order No. 137-142.

Customer No.	Customer Company Name	Eligibility Date for 2% Discount	Eligibility Date for 5% Discount	Eligibility Date for 7% Discount
1	Yorres Shoes	9/22/99	none	none
2	Phillips Shoes	6/8/99	9/18/99	none
3	Wilson Shoes	8/3/99	10/5/99	none
4	Jones Shoes	3/25/99	9/15/99	11/23/99
5	Smith Shoes	9/13/99	11/5/99	none
6	James Shoes	3/10/99	3/10/99	3/30/99

P.O. No.	Transaction Date	Customer No.	Sub Total Amt.	Cumulative Discount Amt. in $
137	11/5/99	2	$196.00	5% - $9.80
138	11/5/99	5	$874.00	5% - $43.70
139	11/18/99	3	$160.00	5% - $8.00
140	11/23/99	4	$952.00	7% - $66.64
141	11/27/99	2	$120.00	5% - $6.00
142	12/1/99	3	$2166.00	5% - $108.30
143	12/1/99	2	$240.00	5% - $12.00
144	12/1/99	4	$952.00	7% - $66.64
145	12/1/99	5	$874.00	5% - $43.70
146	12/25/99	2	$200.00	5% - $10.00

Process purchase/payment forms and records

Learner Outcome

E5. Process purchase/payment forms and records

Competencies

E5e. Analyze discount date and due date to determine the amount of payment on an invoice

Show-Me Standards

Knowledge: (MA1) addition, subtraction, multiplication and division; other number sense, including numeration and estimation; and the application of these operations and concepts in the workplace and other situations.

Performance: (1.4) use technological tools and other resources to locate, select and organize information.
(1.9) assess costs, benefits and other consequences of proposed solutions

Objective

Students will be able to determine discount terms and calculate the cash discount for customer transactions.

Activity 6

- Step 1: Retrieve the Purchase Orders Database. List and Define all of the Discount Terms found on the form:

- Step 2: Turn in your definitions for assessment.

TERM:	DEFINITION:

ACTIVITY 6
PURCHASE ORDER DATABASE

Customer ID	Customer Name	Order ID	Description	Product No.	Product	Description	Ordered	Shipped	Date Received	Ship Date	Ship Via	Quantity	Price	Freight	Terms	Salesperson	Mail Order	Tele Order
2	Phillips Shoes	137	Weekly Supplies	2	TNT Low Tops	Low Tops Co	11/5/99	11/28/99	11/13/99	11/11/99	Speedy Express	7	$28.00	$14.00	3/10 net 30	Fuller, Andrew	Yes	No
3	Wilson Shoes	139	Monthly Order	3	TNT Baby Tops	Children's Co	11/18/99	11/21/99	1/21/99	11/19/99	Speedy Express	20	$8.00	$20.00	2/10 net 30	Davolio, Nancy	No	Yes
5	Smith Shoes	138	Monthly Order	1	TNT High Tops	High Tops Co	11/5/99	12/1/99	12/1/99	11/28/99	Speedy Express	23	$38.00	$69.00	1/10 net 15	Levering, Janet	No	Yes
1	Yorres Shoes	136	Quarterly Order	1	TNT High Tops	High Tops Co	10/17/99	12/25/99	12/11/99	12/9/99	Federal Shipping	11	$38.00	$27.50	1/10 net 30	Peacock, Margaret	No	Yes
4	Jones Shoes	140	Bi-weekly Supplies	2	TNT Low Tops	Low Tops Co	11/23/99	11/28/99	11/28/99	11/26/99	Speedy Express	34	$28.00	$68.00	1/10 net 15	Buchanan, Steven	Yes	No
2	Phillips Shoes	141	Supplies	3	TNT Baby Tops	Children's Co	11/27/99	12/9/99	12/10/99	12/8/99	Federal Shipping	15	$8.00	$7.50	3/10 net 30	Fuller, Andrew	No	Yes
3	Wilson Shoes	142	Monthly Order	1	TNT High Tops	High Tops Co	12/1/99	12/6/99	12/4/99	12/2/99	Speedy Express	57	$38.00	$171.00	2/10 net 30	Peacock, Margaret	No	Yes
2	Phillips Shoes	143	Supplies	3	TNT Baby Tops	Children's Co	12/1/99	12/14/99	12/15/99	12/15/99	Federal Shipping	30	$8.00	$15.00	3/10 net 30	Levering, Janet	Yes	No
4	Jones Shoes	144	Bi-weekly Supplies	2	TNT Low Tops	Low Tops Co	12/1/99	12/6/99	12/6/99	12/3/99	Speedy Express	34	$28.00	$68.00	1/10 net 15	Buchanan, Steven	Yes	No
5	Smith Shoes	145	Monthly Order	1	TNT High Tops	High Tops Co	12/1/99	12/26/99	12/26/99	12/20/99	Federal Shipping	23	$38.00	$57.50	1/10 net 15	Davolio, Nancy	Yes	No
2	Phillips Shoes	146	Supplies	3	TNT Baby Tops	Children's Co	12/25/99	12/28/99	12/28/99	12/26/99	Speedy Express	25	$8.00	$25.00	3/10 net 30	Levering, Janet	No	Yes

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Process purchase/payment forms and records

Activity 6 Assessment

- Discount Terms Listed and Defined:

3/10 net 30	3% discount if paid in 10 days; total due in 30 days
2/10 net 30	2% discount if paid in 10 days; total due in 30 days
1/10 net 15	1% discount if paid in 10 days; total due in 15 days
1/10 net 30	1% discount if paid in 10 days; total due in 30 days

Process purchase/payment forms and records

Learner Outcome

E5. Process purchase/payment forms and records

Competencies

E5e. Analyze discount date and due date to determine the amount of payment on an invoice

Show-Me Standards

Knowledge: (MA1) addition, subtraction, multiplication and division; other number sense, including numeration and estimation; and the application of these operations and concepts in the work-place and other situations.

Performance: (1.4) use technological tools and other resources to locate, select and organize information.
(1.9) assess costs, benefits and other consequences of proposed solutions

Objective

Students will be able to determine discount terms and calculate the cash discount for customer transactions.

Activity 7

- Step 1: Retrieve the Purchase Orders Database.

- Step 2: Figure the amount of cash discount per customer for each transaction on the purchase orders 142-146. (Example: 4/10 net 30 is a 4% cash discount if purchase total is paid within 10 days; otherwise, the total is due in 30 days. If Purchase Total = $100, the customer would receive a $4.00 cash discount if paid within 10 days of invoice; otherwise, the full $100 is due in 30 days.)

PO No	Customer No.	Customer Name	Discount Terms	Total Sale Amt.	Discount Amt.	Amt. Due
142						
143						
144						
145						
146						

- Step 3: Turn in your cash discount answers for assessment.

ACTIVITY 7
PURCHASE ORDER DATABASE

CustNo	Customer Co	PO No	PO Description	Product No	Product	SupplierCo	Ordered	DateReq	DatePromised	ShipDate	ShipCo	Quantity	Price	Freight	Discount	Salesperson	MailOrder	TeleOrder
2	Phillips Shoes	137	Weekly Supplies	2	TNT Low Tops	Low Tops Co.	11/5/99	11/28/99	11/13/99	11/11/99	Speedy Express	7	$28.00	$14.00	3/10 net 30	Fuller, Andrew	Yes	No
3	Wilson Shoes	139	Monthly Order	3	TNT Baby Tops	Children's Co.	11/18/99	11/21/99	1/21/99	11/19/99	Speedy Express	20	$8.00	$20.00	2/10 net 30	Davolio, Nancy	No	Yes
5	Smith Shoes	138	Monthly Order	1	TNT High Tops	High Tops Co.	11/5/99	12/1/99	12/1/99	11/28/99	Speedy Express	23	$38.00	$69.00	1/10 net 15	Leverling, Janet	No	Yes
1	Yorres Shoes	136	Quarterly Order	1	TNT High Tops	High Tops Co.	10/17/99	12/25/99	12/11/99	12/9/99	Federal Shipping	11	$38.00	$27.50	1/10 net 30	Peacock, Margaret	No	Yes
4	Jones Shoes	140	Bi-weekly Supplies	2	TNT Low Tops	Low Tops Co.	11/23/99	11/28/99	11/28/99	11/26/99	Speedy Express	34	$28.00	$68.00	1/10 net 15	Buchanan, Steven	Yes	No
2	Phillips Shoes	141	Supplies	3	TNT Baby Tops	Children's Co.	11/27/99	12/9/99	12/10/99	12/8/99	Federal Shipping	15	$8.00	$7.50	3/10 net 30	Fuller, Andrew	No	Yes
3	Wilson Shoes	142	Monthly Order	1	TNT High Tops	High Tops Co.	12/1/99	12/6/99	12/4/99	12/2/99	Speedy Express	57	$38.00	$171.00	2/10 net 30	Peacock, Margaret	No	Yes
2	Phillips Shoes	143	Supplies	3	TNT Baby Tops	Children's Co.	12/1/99	12/14/99	12/15/99	12/15/99	Federal Shipping	30	$8.00	$15.00	3/10 net 30	Leverling, Janet	Yes	No
4	Jones Shoes	144	Bi-weekly Supplies	2	TNT Low Tops	Low Tops Co.	12/1/99	12/6/99	12/6/99	12/3/99	Speedy Express	34	$28.00	$68.00	1/10 net 15	Buchanan, Steven	Yes	No
5	Smith Shoes	145	Monthly Order	1	TNT High Tops	High Tops Co.	12/1/99	12/26/99	12/26/99	12/20/99	Federal Shipping	23	$38.00	$57.50	1/10 net 15	Davolio, Nancy	Yes	No
2	Phillips Shoes	146	Supplies	3	TNT Baby Tops	Children's Co.	12/25/99	12/28/99	12/28/99	12/26/99	Speedy Express	25	$8.00	$25.00	3/10 net 30	Leverling, Janet	No	Yes

Process purchase/payment forms and records

ACTIVITY 7 ASSESSMENT:

Figure the amount of cash discount per customer for each transaction on the purchase orders 142-146. (Example: 4/10 net 30 is a 4% cash discount if purchase total is paid within 10 days; otherwise, the total is due in 30 days. If Purchase Total = $100, the customer would receive a $4.00 cash discount if paid within 10 days of invoice; otherwise, the full $100 is due in 30 days.)

PO No.	Customer No.	Customer Name	Discount Terms	Total Sale Amt	Discount Amt
142	3	Wilson Shoes	2/10 net 30	$2166.00	$43.32
143	2	Phillips Shoes	3/10 net 30	$240.00	$7.20
144	4	Jones Shoes	1/10 net 15	$952.00	$9.52
145	5	Smith Shoes	1/10 net 15	$874.00	$8.74
146	2	Phillips Shoes	3/10 net 30	$200.00	$6.00

Process purchase/payment forms and records

Learner Outcome

E5. Process purchase/payment forms and records

Activity 8

Competencies

E5e. Analyze discount date and due date to determine the amount of payment on an invoice

Show-Me Standards

Knowledge: (CA1) speaking and writing standard English (including grammar, usage, punctuation, spelling, capitalization.)
(MA1) addition, subtraction, multiplication and division; other number sense, including numeration and estimation; and the application of these operations and concepts in the workplace and other situations.

Performance: (2.1) plan and make written, oral and visual presentations for a variety of purposes and audiences.
(1.4) use technological tools and other resources to locate, select and organize information.
(1.9) assess costs, benefits and other consequences of proposed solutions

Objective

Students will verify payment of invoices.

Activity 8

- Step 1: Retrieve your completed Invoices from Activity 3 or use Answer Key to Activity 3.

- Step 2: Analyze the customer check transactions below to compare the amount paid with the invoice total amount due to verify if the payment was correct, if payment is past due, or if Tennis Shoe Town owes the customer.

P.O. No.	Cust. No.	Written Check Amt.	Actual Amt. Due	Correct Amt. Paid (Yes/No)	Amt. Owed Customer	Amt.Past Due
137	2	$224.06				
139	3	$192.51				
138	5	$0				
136	1	$467.46				
140	4	$1090.89				
141	2	$136.64				
142	3	$2499.42				
143	2	$240.00				
144	4	$1090.98				
145	5	$969.24				
146	2	$246.64				

- Step 3: Write a letter to the customers informing them of discrepancies in payments. Only write to those customers with discrepancies.

Activity 8

INVOICE

TENNIS SHOE TOWN
505 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 12-9-99
Customer No: 1
Customer Name: Yontes Shoe Terms: 1/10 net 30
Address: 87 Polk Street
Jefferson City, MO 65109-0087
Salesperson: Margaret Peacock
PONo: 136 Ship Date: 12-9-99

ID	TNT High Tops	$30.00	$60.00

Please send payment to:
TENNIS SHOE TOWN
505 - 14th Avenue S
Suite 3B

SUBTOTAL	$60.00
Freight	12.50
Sales Tax at 6.85%	4.11

TOTAL DUE $76.61

INVOICE

TENNIS SHOE TOWN
505 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 11-11-99
Customer No: 2
Customer Name: Phillips Shoe Terms: 2/10 net 30
Address: 2743 Herring Street
Springfield, MO 65119-2743
Salesperson: Andrew Fuller
PONo: 137 Ship Date: 11-11-99

ID	TNT Low Tops	$25.00	$50.00

Please send payment to:
TENNIS SHOE TOWN
505 - 14th Avenue S
Suite 3B

SUBTOTAL	$50.00
Freight	10.00
Sales Tax at 6.85%	3.43

TOTAL DUE $63.43

INVOICE

TENNIS SHOE TOWN
505 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 11-26-99
Customer No: 5
Customer Name: Smith Shoe Terms: 1/10 net 15
Address: 9754 Sky Drive
Kansas City, MO 64149-9754
Salesperson: Janet Levering
PONo: 138 Ship Date: 11-26-99

ID	TNT High Tops	$30.00	$60.00

Please send payment to:
TENNIS SHOE TOWN
505 - 14th Avenue S
Suite 3B

SUBTOTAL	$60.00
Freight	10.00
Sales Tax at 6.85%	4.11

TOTAL DUE $74.11

INVOICE

TENNIS SHOE TOWN
505 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 11-19-99
Customer No: 3
Customer Name: Wilson Shoes Terms: 2/10 net 30
Address: 2817 Milton Drive
Columbia, MO 65201-2817
Salesperson: Nancy Davalos
PONo: 139 Ship Date: 11-19-99

ID	TNT Basic Tops	$0.00	$0.00

Please send payment to:
TENNIS SHOE TOWN
505 - 14th Avenue S
Suite 3B

SUBTOTAL	$0.00
Freight	10.00
Sales Tax at 6.85%	0.00

TOTAL DUE $10.00

INVOICE

TENNIS SHOE TOWN
305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 11-26-99
Customer No: 4
Customer Name: Bill Jones Terms: 1/10 net 15
Address: 134 Apple Avenue
Columbia, MO 65202-0134
Salesperson: Steven Buchanan
PONo: 140 Ship Date: 11-26-99

34	TNT Low Tops	$28.00	$952.00

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S
Suite 3B

SUBTOTAL	$952.00
Freight	68.00
Sales Tax @ 6.95%	70.89

TOTAL DUE $ 1090.89

INVOICE

TENNIS SHOE TOWN
305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 12-8-99
Customer No: 2
Customer Name: Rene Phillips Terms: 3/10 net 30
Address: 2743 Bering Street
Springfield, MO 66119-2743
Salesperson: Andrew Fuller
PONo: 141 Ship Date: 12-8-99

15	TNT Baby Tops	$8.00	$120.00

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S
Suite 3B

SUBTOTAL	$120.00
Freight	7.50
Sales Tax @ 6.95%	8.86

TOTAL DUE $ 136.36

INVOICE

TENNIS SHOE TOWN
305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 12-2-99
Customer No: 3
Customer Name: Wilson Shoes Terms: 2/10 net 30
Address: 2817 Milton Drive
Columbia, MO 65201-2817
Salesperson: Margaret Peacock
PONo: 142 Ship Date: 12-2-99

57	TNT High Tops	$38.00	$2166.00

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S
Suite 3B

SUBTOTAL	$2166.00
Freight	171.00
Sales Tax @ 6.95%	162.42

TOTAL DUE $ 2499.42

INVOICE

TENNIS SHOE TOWN
305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 12-15-99
Customer No: 2
Customer Name: Phillips Shoes Terms: 3/10 net 30
Address: 2743 Bering Street
Springfield, MO 66119-2743
Salesperson: Janet Leverling
PONo: 143 Ship Date: 12-15-99

30	TNT Baby Tops	$8.00	$240.00

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S
Suite 3B

SUBTOTAL	$240.00
Freight	15.00
Sales Tax @ 6.95%	17.72

TOTAL DUE $ 272.72

INVOICE

TENNIS SHOE TOWN
305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 12-3-99
Customer No: 4
Customer Name: Jones Shoes Terms: 1/10 net 15
Address: 134 Apple Avenue
Columbia, MO 65202-0134
Salesperson: Steven Buchanon
PONo. 144 Ship Date: 12-3-99

34	TNT Low Tops	$28.00	$952.00

SUBTOTAL	$952.00
Freight	68.00
Sales Tax @ 6.95%	70.89
TOTAL DUE	$ 1090.89

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S
Suite 3B

INVOICE

TENNIS SHOE TOWN
305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 12-20-99
Customer No: 5
Customer Name: Smith Shoes Terms: 1/10 net 15
Address: 9754 Sky Drive
Kansas City, MO 61149-9754
Salesperson: Margaret Peacock
PONo. 145 Ship Date: 12-20-99

23	TNT High Tops	$38.00	$874.00

SUBTOTAL	$874.00
Freight	57.50
Sales Tax @ 6.95%	64.74
TOTAL DUE	$ 996.24

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S
Suite 3B

INVOICE

TENNIS SHOE TOWN
305 - 14th Ave. S.
Suite 3B
Columbia, MO 65203

Date of Invoice: 12-26-99
Customer No: 2
Customer Name: Phillips Shoes Terms: 3/10 net 30
Address: 2743 E[illegible]ing Street
Springfield, MO 66119-2743
Salesperson: Janet Leverling
PONo. 146 Ship Date: 12-26-99

25	TNT Baby Tops	$8.00	$200.00

SUBTOTAL	$200.00
Freight	25.00
Sales Tax @ 6.95%	15.64
TOTAL DUE	$ 240.64

Please remit payment to:
TENNIS SHOE TOWN
305 - 14th Avenue S
Suite 3B

Process purchase/payment forms and records

ACTIVITY 8 ASSESSMENT:

Analyze the customer check transactions below to compare the amount paid vs. the invoice total amount due to verify if the payment was correct or if a payment is past due.

P.O. No.	Customer No.	Written Check Amt.	Actual Amt. Due	Correct Amt. Paid (Yes/No)	Amt. Due or Owed Customer (+/-)	Amt. Past Due
137	2	$224.06	$224.60	No	0	0.54
139	3	$192.51	$192.51	Yes	0	0
138	5	$0	$874.00	No	0	874.00
136	1	$467.46	$476.46	No	0	9.00
140	4	$1090.89	$1090.89	Yes	0	0
141	2	$136.64	$136.36	No	0.28	0
142	3	$2499.42	$2499.42	Yes	0	0
143	2	$240.00	$272.72	No	0	32.72
144	4	$1090.98	$1090.89	No	0.09	0
145	5	$969.24	$996.24	No	0	27.00
146	2	$246.64	$240.64	No	6.00	0

Process purchase/payment forms and records

ACTIVITY 8 ASSESSMENT:

For each statement listed below, assign a rating for the letters to be evaluated based on the following scale:

- **Excellent:** the student successfully completed the activity with all required items with no assistance.
- **Good**: the student completed the activity with all items; required some assistance from the teacher.
- **Poor:** the student completed the activity with 2 or more items missing from the letters; teacher assistance was necessary to complete letters.
- **Not Acceptable:** the student did not complete the activity; three or more items missing from letters.

Excellent/Good	Poor/Not Acceptable	Activity Requirement	Comments
(25 – 19 pts)	(18 – 0 pts)	Letter presented clear, concise information regarding payment discrepancies. (0 to 15 pts)	
(10 – 6 pts)	(5 – 0 pts)	Letter was error-free and of high quality. (0 to 10 pts)	
(5 – 3 pts)	(2 – 0 pts)	Information was readable, timely, and accurate. (0 to 5 pts)	
Total Points ___/40			

Understand Inventory Control

Learner Outcome

E8. Understand inventory control

Activity 9

Competencies

E8a. Explain the importance of inventory control

Show-Me Standards

Knowledge: (MA1) addition, subtraction, multiplication and division; other number sense, including numeration and estimation; and the application of these operations and concepts in the workplace and other situations.

Performance: (1.8) organize data, information and ideas into useful forms (including charts, graphs, outlines) for analysis or presentation.
(1.9) assess costs, benefits and other consequences of proposed solutions

Objective

Students will complete inventory transactions for returned merchandise.

Activity 9

- Step 1: Retrieve the Inventory Database and the Customer Purchases Database Forms for High Tops, Low Tops and Baby Tops.

- Step 2: Figure the Total Amount of Units Sold to each Customer based on information in the Inventory

  Database. Fill in the amounts in the Customer Purchase Databases.

- Step 3: Add the following returns to your Customer Purchases Database Forms (High Top Purchases, Low Top Purchases, Baby Top Purchases.) Include the reasons for returns.

CUST. NO.	TRANSACTION DATE:	RETURN INFORMATION:
1	12-27-99	Returned 2 high tops due to defects.
2	None	No Returns for year.
3	12-29-99	Returned 1 high top due to defect.
4	12-29-99	Returned 1 baby top in exchange for 1 low top – Wrong item shipped.
5	12-30-99	Returned 4 high tops due to defect.
6	None	No Returns for year.

Activity 9

- Step 4: Turn in all 3 of the Customer Purchases Database forms for assessment.
- Step 5: Create a bar graph of the reasons for returns for month of December. Include a heading for the graph. Label the x-axis, y-axis and provide a legend.
- Step 6: Turn in the bar graph for assessment.

Enrichment Activity:

- Create the above bar graph using a spreadsheet software program. Print to color if available.

ACTIVITY 9
INVENTORY DATABASE

Transaction Date	Product No.	Product	PONo	Description	Price	Customer No.	Purchases	Received	Sales	Total Sale	Shrinkage	HTReturns	HTReason	LTReturns	LTReason	BTReturns	BTReason	HTOnHand	LTOnHand	BTOnHand
1/1/99	1	TST High Tops		Supplies	$8.00		100	100										100	100	100
1/1/99	2	TST Low Tops		Supplies	$6.00		100	100										100	100	100
1/1/99	3	TST Baby Tops		Supplies	$2.00		100	100										100	100	100
1/12/99	3	TST Baby Tops	99	Order	$8.00	1	7	7	7	$56.00								100	100	93
1/15/99	1	TST High Tops	100	Order	$38.00	2	34	34	34	$1,292.00								66	100	93
1/30/99	2	TST Low Tops	131	Order	$28.00	3	20	20	20	$560.00								66	80	93
2/2/99	3	TST Baby Tops	102	Order	$8.00	4	23	23	23	$32.00								66	80	70
2/10/99	2	TST Low Tops	103	Order	$28.00	5	28	28	28	$784.00								66	58	70
2/25/99	3	TST Baby Tops		Supplies	$2.00		230	230										66	58	300
3/2/99	1	TST High Tops		Supplies	$8.00		42	42										100	58	300
3/10/99	3	TST Baby Tops	104	Order	$8.00	6	200	200	200	$1600.00								100	58	100
3/21/99	2	TST Low Tops		Supplies	$6.00		30	30										100	100	100
3/22/99	1	TST High Tops		Supplies	$8.00		100	100										200	100	100
3/25/99	1	TST High Tops	105	Order	$38.00	4	100	100	100	$3800.00								100	100	100
3/28/99	2	TST Low Tops		Supplies	$6.00		100	100										100	200	100
3/30/99	2	TST Low Tops	106	Order	$28.00	6	100	100	100	$2800.00								100	100	100
4/1/99	3	TST Baby Tops	107	Order	$8.00	4	25	25	25	$200.00		0		0		0		100	100	75
4/4/99	3	TST Baby Tops		Supplies	$2.00		25	25										100	100	100
4/15/99	3	TST Baby Tops	108	Order	$8.00	1	25	25	25	$200.00		0		0		0		100	100	75
4/17/99	3	TST Baby Tops		Supplies	$2.00		25	25			2							100	100	100
4/28/99	2	TST Low Tops	109	Order	$28.00	3	25	25	25	$700.00		0		0		0		100	75	100
5/1/99	2	TST Low Tops		Supplies	$6.00		25	25										100	100	100
5/28/99	3	TST Baby Tops	110	Order	$8.00	2	50	50	50	$400.00		0		0		0		100	100	50
6/1/99	3	TST Baby Tops		Supplies	$2.00		100	100				0		0		0		100	100	150
6/1/99	2	TST Low Tops		Supplies	$6.00		50	50				0		0		0		100	150	150
6/3/99	3	TST Baby Tops	111	Order	$8.00	3	50	50	50	$400.00		0		0		0		100	100	100
6/8/99	3	TST Baby Tops	112	Order	$8.00	2	50	50	50	$400.00		0		0		0		100	100	50
6/18/99	2	TST Low Tops	113	Order	$28.00	4	50	50	50	$1,400.00		0		0		0		100	50	50
6/21/99	2	TST Low Tops	114	Order	$28.00	6	50	50	50	$1,400.00		0		0		0		100	0	50
6/22/99	2	TST Low Tops		Supplies	$6.00		100	100				0		0		0		100	100	50
6/27/99	2	TST Low Tops	115	Order	$28.00	5	50	50	50	$1,400.00		0		0		0		100	50	50
7/1/99	2	TST Low Tops	116	Order	$28.00	6	50	0	0	$0.00		0		0		0		100	0	50
7/2/99	1	TST High Tops	117	Order	$38.00	1	25	25	25	$950.00		0		0		0		75	0	50
7/2/99	3	TST Baby Tops		Supplies	$2.00		100	100				0		0		0		75	0	150
7/2/99	2	TST Low Tops		Supplies	$6.00		100	0				0		0		0		75	0	150
7/2/99	1	TST High Tops		Supplies	$8.00		175	175				0		0		0		200	0	150
7/3/99	3	TST Baby Tops	118	Order	$8.00	2	25	25	25	$200.00		0		0		0		200	0	125
7/3/99	2	TST Low Tops		BackSuppkes	$6.00		0	100				0		0		0		200	100	125

ACTIVITY 9
INVENTORY DATABASE CONTINUED

Transaction Date	Product No.	Product	PO No	Description	Price	Cust No	Purchased	Received	Sales	Total Sale	Shrinkage	HT Returns	HT Reason	LT Returns	LT Reason	BT Returns	BT Reason	HT On-Hand	LT On-Hand	BT On-Hand
8/3/99	1	TST High Tops	121	Order	$38.00	3	50	50	50	$1,900.00		0		0		0		125	100	125
8/15/99	2	TST Low Tops	122	Order	$28.00	4	25	25	25	$700.00		0		0		0		125	25	125
8/17/99	1	TST High Tops		Supplies	$8.00		100	100				0		0		0		225	25	125
8/30/99	2	TST Low Tops	123	Order	$28.00	6	25	25	25	$700.00		0		0		0		225	0	125
9/6/99	1	TST High Tops		Supplies	$8.00		25	25	25			0		0		0		250	0	125
9/10/99	2	TST Low Tops		Supplies	$28.00		500	500				0		0		0		250	500	125
9/10/99	1	TST High Tops		Supplies	$38.00		1000	1000				0		0		0		1250	500	125
9/10/99	3	TST Baby Tops		Supplies	$8.00		175	175				0		0		0		1250	500	300
9/11/99	1	TST High Tops	124	Order	$38.00	8	100	100	100	$3800.00		0		0		0		1150	500	300
9/13/99	1	TST High Tops	125	Order	$38.00	5	75	75	75	$2850.00		0		0		0		1100	500	300
9/15/99	1	TST High Tops	126	Order	$38.00	4	50	50	50	$1900.00		0		0		0		1050	500	300
9/16/99	1	TST High Tops	127	Order	$38.00	3	50	50	50	$1900.00		0		0		0		1000	500	300
9/18/99	2	TST Low Tops	128	Order	$28.00	2	50	50	50	$1400.00		0		0		0		1000	450	300
9/22/99	3	TST Baby Tops	129	Order	$8.00	1	50	50	50	$400.00		0		0		0		1000	450	250
9/28/99	2	TST Low Tops	130	Order	$28.00	5	25	25	25	$700.00		0		0		0		1000	425	250
10/1/99	3	TST Baby Tops	131	Order	$8.00	4	50	50	50	$400.00		0		0		0		1000	425	200
10/5/99	1	TST High Tops	132	Order	$38.00	3	25	25	25	$950.00		0		0		0		975	425	200
10/12/99	2	TST Low Tops	133	Order	$28.00	2	25	25	25	$700.00		0		0		0		975	400	200
10/14/99	2	TST Low Tops	134	Order	$28.00	1	50	50	50	$1400.00		0		0		0		975	350	200
10/16/99	2	TST Low Tops	135	Order	$28.00	6	25	25	25	$700.00		0		0		0		975	325	200
10/17/99	1	TST High Tops	136	Order	$38.00	1	11	11	11	$418.00		0		0		0		964	325	200
11/5/99	2	TST Low Tops	137	Order	$28.00	2	7	7	7	$196.00		0		0		0		964	318	200
11/5/99	1	TST High Tops	138	Order	$38.00	5	23	23	23	$874.00		0		0		0		941	318	200
11/18/99	3	TST Baby Tops	139	Order	$8.00	3	20	20	20	$160.00		0		0		0		941	318	180
11/23/99	2	TST Low Tops	140	Order	$28.00	4	34	34	34	$952.00		0		0		0		941	284	180
11/27/99	3	TST Baby Tops	141	Order	$8.00	2	15	15	15	$120.00		0		0		0		941	284	165
12/1/99	1	TST High Tops	142	Order	$38.00	3	57	57	57	$2166.00		0		0		0		884	284	165
12/1/99	3	TST Baby Tops	143	Order	$8.00	2	30	30	30	$240.00		0		0		0		884	284	135
12/1/99	2	TST Low Tops	144	Order	$28.00	4	34	34	34	$952.00		0		0		0		884	250	135
12/1/99	1	TST High Tops	145	Order	$38.00	5	23	23	23	$874.00		0		0		0		861	250	135
12/25/99	3	TST Baby Tops	146	Order	$8.00	2	25	25	25	$200.00		0		0		0		861	250	110

ACTIVITY 9 CUSTOMER PURCHASE DATABASES

HIGH TOP PURCHASES

Cust No.	Cust-Name	Total UnitsSold	Price	Discount	TotalAmt-Sold	High Top Returns	High Top Reason
1	Yorres Shoes		$38.00	1/10 net 30			
2	Phillips Shoes		$38.00	3/10 net 30			
3	Wilson Shoes		$38.00	2/10 net 30			
4	Jones Shoes		$38.00	1/10 net 15			
5	Smith Shoes		$38.00	1/10 net 15			
6	James Shoes		$38.00	none			

LOW TOP PURCHASES

Cust No.	Cust-Last	Total UnitsSold	Price	Discount	TotalAmt-Sold	Low Top Returns	Low Top Reason
1	Yorres Shoes		$28.00	1/10 net 30			
2	Phillips Shoes		$28.00	3/10 net 30			
3	Wilson Shoes		$28.00	2/10 net 30			
4	Jones Shoes		$28.00	1/10 net 15			
5	Smith Shoes		$28.00	1/10 net 15			
6	James Shoes		$28.00	none			

BABY TOP PURCHASES

Cust No.	Cust-Name	Total UnitsSold	Price	Discount	TotalAmt-Sold	Baby Top Returns	Baby Top Reason
1	Yorres Shoes		$8.00	1/10 net 30			
2	Phillips Shoes		$8.00	3/10 net 30			
3	Wilson Shoes		$8.00	2/10 net 30			
4	Jones Shoes		$8.00	1/10 net 15			
5	Smith Shoes		$8.00	1/10 net 15			
6	James Shoes		$8.00	none			

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ACTIVITY 9 CUSTOMER PURCHASE DATABASES ANSWER KEY

HIGH TOP PURCHASES

Cust No.	CustCo	Total UnitsSold	Price	Discount	TotalAmt-Sold	High Top Returns	High Top Reason
1	Yorres Shoes	36	$38.00	1/10 net 30	$1368.00	2	due to defects
2	Phillips Shoes	34	$38.00	3/10 net 30	$1292.00	0	
3	Wilson Shoes	182	$38.00	2/10 net 30	$6916.00	1	due to defect
4	Jones Shoes	150	$38.00	1/10 net 15	$5700.00	0	
5	Smith Shoes	121	$38.00	1/10 net 15	$4598.00	4	due to defect
6	James Shoes	100	$38.00	none	$3800.00	0	

LOW TOP PURCHASES

Cust No.	CustCo	Total UnitsSold	Price	Discount	TotalAmt-Sold	Low Top Returns	Low Top Reason
1	Yorres Shoes	50	$28.00	1/10 net 30	$1400.00	0	
2	Phillips Shoes	82	$28.00	3/10 net 30	$2296.00	0	
3	Wilson Shoes	45	$28.00	2/10 net 30	$1260.00	0	
4	Jones Shoes	143	$28.00	1/10 net 15	$4004.00	0	
5	Smith Shoes	103	$28.00	1/10 net 15	$2884.00	0	
6	James Shoes	250	$28.00	none	$7000.00	0	

BABY TOP PURCHASES

Cust No.	CustCo	Total UnitsSold	Price	Discount	TotalAmt-Sold	Baby Top Returns	Baby Top Reason
1	Yorres Shoes	82	$8.00	1/10 net 30	$656.00	0	
2	Phillips Shoes	170	$8.00	3/10 net 30	$1360.00	0	
3	Wilson Shoes	70	$8.00	2/10 net 30	$400.00	0	
4	Jones Shoes	98	$8.00	1/10 net 15	$784.00	1	Wrong item shipped.
5	Smith Shoes	0	$8.00	1/10 net 15	$0	0	
6	James Shoes	200	$8.00	none	$1600.00	0	

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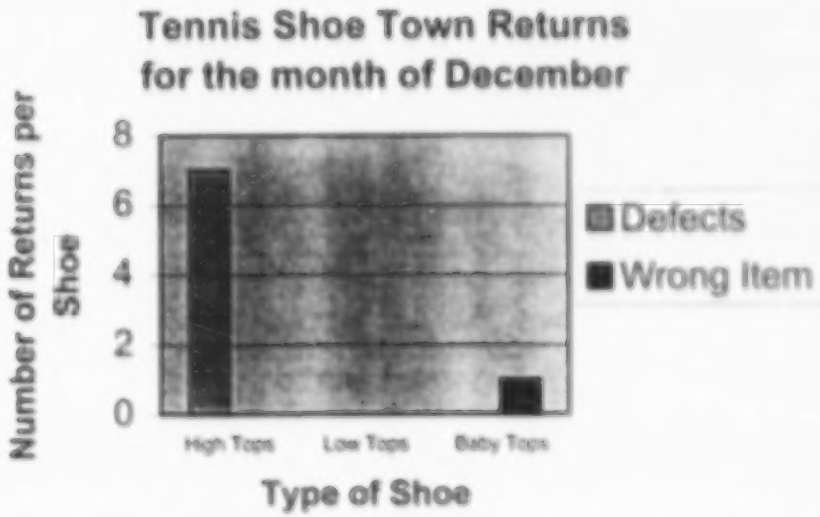
ACTIVITY 9 GRAPH:



Understand Inventory Control

Learner Outcome

E8. Understand inventory control

Competencies

E8a. Explain the importance of inventory control

Show-Me Standards

Knowledge: (CA1) speaking and writing standard English (including grammar, usage, punctuation, spelling, capitalization).

Performance: (2.1) plan and make written, oral and visual presentations for a variety of purposes and audiences.

Objective

Students will be able to determine how to improve returns of products.

Activity 10

- Step 1: Retrieve the Customer Purchases Database Answers to Activity 9 or use the Answer Key to Activity 9.
- Step 2: Write a brief report on your suggestions to reduce the number of returned shoes.
- Step 3: Turn in the report for assessment.

ACTIVITY 9 CUSTOMER PURCHASE DATABASES

HIGH TOP PURCHASES

Cust No.	CustCo	Total UnitsSold	Price	Discount	TotalAmt-Sold	High Top Returns	High Top Reason
1	Yorres Shoes	36	$38.00	1/10 net 30	$1368.00	2	due to defects
2	Phillips Shoes	34	$38.00	3/10 net 30	$1292.00	0	
3	Wilson Shoes	182	$38.00	2/10 net 30	$6916.00	1	due to defect
4	Jones Shoes	150	$38.00	1/10 net 15	$5700.00	0	
5	Smith Shoes	121	$38.00	1/10 net 15	$4598.00	4	due to defect
6	James Shoes	100	$38.00	none	$3800.00	0	

LOW TOP PURCHASES

Cust No.	CustCo	Total UnitsSold	Price	Discount	TotalAmt-Sold	Low Top Returns	Low Top Reason
1	Yorres Shoes	50	$28.00	1/10 net 30	$1400.00	0	
2	Phillips Shoes	82	$28.00	3/10 net 30	$2296.00	0	
3	Wilson Shoes	45	$28.00	2/10 net 30	$1260.00	0	
4	Jones Shoes	143	$28.00	1/10 net 15	$4004.00	0	
5	Smith Shoes	103	$28.00	1/10 net 15	$2884.00	0	
6	James Shoes	250	$28.00	none	$7000.00	0	

BABY TOP PURCHASES

Cust No.	CustCo	Total UnitsSold	Price	Discount	TotalAmt-Sold	Baby Top Returns	Baby Top Reason
1	Yorres Shoes	82	$8.00	1/10 net 30	$656.00	0	
2	Phillips Shoes	170	$8.00	3/10 net 30	$1360.00	0	
3	Wilson Shoes	70	$8.00	2/10 net 30	$400.00	0	
4	Jones Shoes	98	$8.00	1/10 net 15	$784.00	1	Wrong item shipped.
5	Smith Shoes	0	$8.00	1/10 net 15	$0	0	
6	James Shoes	200	$8.00	none	$1600.00	0	

ACTIVITY 10 ASSESSMENT

For each statement listed below, assign a rating for the report to be evaluated based on the following scale:

- **Excellent:** the student successfully completed the activity with all required items with no assistance.
- **Good**: the student completed the activity with all items; required some assistance from the teacher.
- **Poor:** the student completed the activity with 2 or more items missing from the report; teacher assistance was necessary to complete report.
- **Not Acceptable:** the student did not complete the activity; three or more items missing from report.

Excellent/ Good	Poor/Not Acceptable	Activity Requirement	Comments
(25 – 19 pts)	(18 – 0 pts)	Report presented clear, concise information regarding payment discrepancies. (0 to 15 pts)	
(10 – 6 pts)	(5 – 0 pts)	Report was error-free and of high quality. (0 to 10 pts)	
(5 – 3 pts)	(2 – 0 pts)	Information was readable, timely, and accurate. (0 to 5 pts)	
Total Points ___/40			

Understand Inventory Control

Activity 11

Learner Outcome

E8. Understand inventory control

Competencies

E8a. Explain the importance of inventory control

Show-Me Standards

Knowledge: (MA1) addition, subtraction, multiplication and division; other number sense, including numeration and estimation; and the application of these operations and concepts in the workplace and other situations.

Performance: (1.8) organize data, information and ideas into useful forms (including charts, graphs, outlines) for analysis or presentation.
(1.9) assess costs, benefits and other consequences of proposed solutions

Objective

Students will be able to analyze re-order information and create a standardized form for personnel to maintain inventory control.

Activity 11

- Step 1: Retrieve the Inventory Database.
- Step 2: Analyze the times of the year that Tennis Shoe Town needs to re-order. We need to maintain 100 pairs of each shoe at all times throughout the year.
- Step 3: List below the times during the year Tennis Shoe Town needs to re-order the three products.

SHOE:	LIST ALL MONTHS FOR RE-ORDER:
HIGH TOPS	
LOW TOPS	
BABY TOPS	

Understand Inventory Control

Activity 11

- Step 4: Retrieve the Inventory Database.
- Step 5: Divide the inventory into four quarters. Analyze the inventory to make recommendations on how to improve inventory control procedures per quarter.
- Step 6: As an employee of Tennis Shoe Town, write a memo to the inventory control manager providing your recommendation for how to improve inventory control and your rationale for your improvements.

ACTIVITY 11
INVENTORY DATABASE

Transaction Date	Product No.	Product	PONo	Description	Price	Customer # No	Purchased	Received	Sales	Total Sale	Shrinkage	HTReturns	HTReason	LTReturns	LTReason	BTReturns	BTReason	HTOnHand	LTOnHand	BTOnHand
1/1/99	1	TST High Tops		Supplies	$8.00		100	100										100	100	100
1/1/99	2	TST Low Tops		Supplies	$6.00		100	100										100	100	100
1/1/99	3	TST Baby Tops		Supplies	$2.00		100	100										100	100	100
1/12/99	3	TST Baby Tops	99	Order	$8.00	1	7	7	7	$56.00								100	100	93
1/15/99	1	TST High Tops	100	Order	$38.00	2	34	34	34	$1,292.00								66	100	93
1/30/99	2	TST Low Tops	131	Order	$28.00	3	20	20	20	$560.00								66	80	93
2/2/99	3	TST Baby Tops	102	Order	$8.00	4	23	23	23	$32.00								66	80	70
2/10/99	2	TST Low Tops	103	Order	$28.00	5	28	28	28	$784.00								66	58	70
2/25/99	3	TST Baby Tops		Supplies	$2.00		230	230										66	58	300
3/2/99	1	TST High Tops		Supplies	$8.00		42	42										100	58	300
3/10/99	3	TST Baby Tops	104	Order	$8.00	6	200	200	200	$1600.00								100	58	100
3/21/99	2	TST Low Tops		Supplies	$6.00		30	30										100	100	100
3/22/99	1	TST High Tops		Supplies	$8.00		100	100										200	100	100
3/25/99	1	TST High Tops	105	Order	$38.00	4	100	100	100	$3800.00								100	100	100
3/28/99	2	TST Low Tops		Supplies	$6.00		100	100										100	200	100
3/30/99	2	TST Low Tops	106	Order	$28.00	6	100	100	100	$2800.00								100	100	100
4/1/99	3	TST Baby Tops	107	Order	$8.00	4	25	25	25	$200.00		0		0		0		100	100	75
4/4/99	3	TST Baby Tops		Supplies	$2.00		25	25										100	100	100
4/15/99	3	TST Baby Tops	108	Order	$8.00	1	25	25	25	$200.00		0		0		0		100	100	75
4/17/99	3	TST Baby Tops		Supplies	$2.00		25	25			2							100	100	100
4/28/99	2	TST Low Tops	109	Order	$28.00	3	25	25	25	$700.00		0		0		0		100	75	100
5/1/99	2	TST Low Tops		Supplies	$6.00		25	25										100	100	100
5/28/99	3	TST Baby Tops	110	Order	$8.00	2	50	50	50	$400.00		0		0		0		100	100	50
6/1/99	3	TST Baby Tops		Supplies	$2.00		100	100				0		0		0		100	100	150
6/1/99	2	TST Low Tops		Supplies	$6.00		50	50				0		0		0		100	150	150
6/3/99	3	TST Baby Tops	111	Order	$8.00	3	50	50	50	$400.00		0		0		0		100	100	100
6/8/99	3	TST Baby Tops	112	Order	$8.00	2	50	50	50	$400.00		0		0		0		100	100	50
6/18/99	2	TST Low Tops	113	Order	$28.00	4	50	50	50	$1,400.00		0		0		0		100	50	50
6/21/99	2	TST Low Tops	114	Order	$28.00	6	50	50	50	$1,400.00		0		0		0		100	0	50
6/22/99	2	TST Low Tops		Supplies	$6.00		100	100				0		0		0		100	100	50
6/27/99	2	TST Low Tops	115	Order	$28.00	5	50	50	50	$1,400.00		0		0		0		100	50	50
7/1/99	2	TST Low Tops	116	Order	$28.00	6	50	0	0	$0.00		0		0		0		100	0	50
7/2/99	1	TST High Tops	117	Order	$38.00	1	25	25	25	$950.00		0		0		0		75	0	50
7/2/99	3	TST Baby Tops		Supplies	$2.00		100	100				0		0		0		75	0	150
7/2/99	2	TST Low Tops		Supplies	$6.00		100	0				0		0		0		75	0	150
7/2/99	1	TST High Tops		Supplies	$8.00		175	175				0		0		0		200	0	150
7/3/99	3	TST Baby Tops	118	Order	$8.00	2	25	25	25	$200.00		0		0		0		200	0	125
7/3/99	2	TST Low Tops		BackSupplies	$6.00		0	100				0		0		0		200	100	125

ACTIVITY 11
INVENTORY DATABASE CONTINUED

Transaction Date	Product No.	Product	PO No	Description	Price	Cust No	Purchases	Received	Sales	Total Sale	Shrinkage	HT Returns	HT Reason	LT Returns	LT Reason	BT Returns	BT Reason	HT On-Hand	LT On-Hand	BT On-Hand
8/3/99	1	TST High Tops	121	Order	$38.00	3	50	50	50	$1,900.00		0		0		0		125	100	125
8/15/99	2	TST Low Tops	122	Order	$28.00	4	25	25	25	$700.00		0		0		0		125	25	125
8/17/99	1	TST High Tops		Supplies	$8.00		100	100				0		0		0		225	25	125
8/30/99	2	TST Low Tops	123	Order	$28.00	6	25	25	25	$700.00		0		0		0		225	0	125
9/6/99	1	TST High Tops		Supplies	$8.00		25	25	25			0		0		0		250	0	125
9/10/99	2	TST Low Tops		Supplies	$28.00		500	500				0		0		0		250	500	125
9/10/99	1	TST High Tops		Supplies	$38.00		1000	1000				0		0		0		1250	500	125
9/10/99	3	TST Baby Tops		Supplies	$8.00		175	175				0		0		0		1250	500	300
9/11/99	1	TST High Tops	124	Order	$38.00	6	100	100	100	$3800.00		0		0		0		1150	500	300
9/13/99	1	TST High Tops	125	Order	$38.00	5	75	75	75	$2850.00		0		0		0		1100	500	300
9/15/99	1	TST High Tops	126	Order	$38.00	4	50	50	50	$1900.00		0		0		0		1050	500	300
9/16/99	1	TST High Tops	127	Order	$38.00	3	50	50	50	$1900.00		0		0		0		1000	500	300
9/18/99	2	TST Low Tops	128	Order	$28.00	2	50	50	50	$1400.00		0		0		0		1000	450	300
9/22/99	3	TST Baby Tops	129	Order	$8.00	1	50	50	50	$400.00		0		0		0		1000	450	250
9/28/99	2	TST Low Tops	130	Order	$28.00	5	25	25	25	$700.00		0		0		0		1000	425	250
10/1/99	3	TST Baby Tops	131	Order	$8.00	4	50	50	50	$400.00		0		0		0		1000	425	200
10/5/99	1	TST High Tops	132	Order	$38.00	3	25	25	25	$950.00		0		0		0		975	425	200
10/12/99	2	TST Low Tops	133	Order	$28.00	2	25	25	25	$700.00		0		0		0		975	400	200
10/14/99	2	TST Low Tops	134	Order	$28.00	1	50	50	50	$1400.00		0		0		0		975	350	200
10/16/99	2	TST Low Tops	135	Order	$28.00	6	25	25	25	$700.00		0		0		0		975	325	200
10/17/99	1	TST High Tops	136	Order	$38.00	1	11	11	11	$418.00		0		0		0		964	325	200
11/5/99	2	TST Low Tops	137	Order	$28.00	2	7	7	7	$196.00		0		0		0		964	318	200
11/5/99	1	TST High Tops	138	Order	$38.00	5	23	23	23	$874.00		0		0		0		941	318	200
11/18/99	3	TST Baby Tops	139	Order	$8.00	3	20	20	20	$160.00		0		0		0		941	318	180
11/23/99	2	TST Low Tops	140	Order	$28.00	4	34	34	34	$952.00		0		0		0		941	284	180
11/27/99	3	TST Baby Tops	141	Order	$8.00	2	15	15	15	$120.00		0		0		0		941	284	165
12/1/99	1	TST High Tops	142	Order	$38.00	3	57	57	57	$2166.00		0		0		0		884	284	165
12/1/99	3	TST Baby Tops	143	Order	$8.00	2	30	30	30	$240.00		0		0		0		884	284	135
12/1/99	2	TST Low Tops	144	Order	$28.00	4	34	34	34	$952.00		0		0		0		884	250	135
12/1/99	1	TST High Tops	145	Order	$38.00	5	23	23	23	$874.00		0		0		0		861	250	135
12/25/99	3	TST Baby Tops	146	Order	$8.00	2	25	25	25	$200.00		0		0		0		861	250	110

Understand Inventory Control

ACTIVITY 11 ASSESSMENT:
Listed below are the times during the year Tennis Shoe Town needs to re-order its three products.

SHOE:	MONTHS:
HIGH TOPS	January July
LOW TOPS	April June August
BABY TOPS	January April May June

ACTIVITY 11 ASSESSMENT

For each statement listed below, assign a rating for the memo to be evaluated based on the following scale:

- **Excellent:** the student successfully completed the activity with all required items with no assistance.
- **Good**: the student completed the activity with all items; required some assistance from the teacher.
- **Poor:** the student completed the activity with 2 or more items missing from the memo; teacher assistance was necessary to complete memo.
- **Not Acceptable:** the student did not complete the activity; three or more items missing from memo.

Excellent/ Good	Poor/Not Acceptable	Activity Requirement	Comments
(25 – 19 pts)	(18 – 0 pts)	Memo presented clear, concise descriptions which would improve inventory control of products. (0 to 15 pts)	
(10 – 6 pts)	(5 – 0 pts)	Memo was error-free and of high quality. (0 to 10 pts)	
(5 – 3 pts)	(2 – 0 pts)	Information was readable, timely, and accurate. (0 to 5 pts)	
Total Points ___/40			

Manage Inventory

Activity 12

Learner Outcome

E6. Manage Inventory

Competencies

E6a. Calculate sock turnover

Show-Me Standards

Knowledge: addition, subtraction, multiplication and division; other number sense, including numeration and estimation; and the application of these operations and concepts in the workplace and other situations.

Performance: (1.4) use technological tools and other resources to locate, select and organize information.
(1.9) assess costs, benefits and other consequences of proposed solutions

Objective

Students will be able to calculate stock turnover for a specific period of time.

Activity 12

- Step 1: Retrieve the Inventory Database.
- Step 2: Fil out the table below needed to calculate stock turnover. Inventory on Hand in dolars and Monthly Net Sales in dollars includes all three products.

Last 6 Months	Inventory on Hand in $	Monthly Net Sales in $
July		
August		
September		
October		
November		
December		
Total:		

- Step 3: Cicalate the Average Inventory on Hand:

$$\frac{\text{Total Inventory}}{\text{No. of Months}}$$

Activity 12

- Step 4: Calculate the Stock Turnover Rate using the formula below:

$$\frac{\text{Total Net Sales}}{\text{Average Inventory on hand}}$$

Stock Turnover Rate for the last six months = _____

- Step 5: What does the above stock turnover rate represent?

ACTIVITY 12
INVENTORY DATABASE

Transaction Entry Date	Product No.	Product Description	Purchase Order No.	Transaction Description	Price	Units Ordered	Units Received	Back Ordered	Sales	Total Daily Sales	Beginning Inventory	Units Ordered During Month	Units Received During Month	Units Sold During Month	Returns	Damaged Items	Write Offs	Ending Inventory	Reorder Point	Out of Stock
1/1/06	1	1727 High Trips		Supplies	$0.00		100	100										100	100	100
1/1/06	2	1727 Low Trips		Supplies	$0.00		100	100										100	100	100
1/1/06	3	1727 Baby Trips		Supplies	$0.00		100	100										100	100	100
1/12/06	3	1727 Baby Trips	99	Order	$50.00	1	1	1	1	$50.00								100	100	99
1/15/06	1	1727 High Trips	100	Order	$195.00	2	98	98	98	$1,282.00								98	100	98
1/30/06	2	1727 Low Trips	101	Order	$250.00	5	20	20	20	$5000.00								98	80	80
2/2/06	3	1727 Baby Trips	102	Order	$50.00	4	23	23	23	$50.00								98	80	76
2/10/06	2	1727 Low Trips	103	Order	$250.00	5	26	26	26	$750.00								98	80	75
2/25/06	3	1727 Baby Trips		Supplies	$0.00		200	200										98	80	300
3/2/06	1	1727 High Trips		Supplies	$0.00		40	40										100	80	300
3/10/06	3	1727 Baby Trips	104	Order	$0.00	6	200	200	200	$10000.00								100	80	100
3/21/06	2	1727 Low Trips		Supplies	$0.00		50	50										100	100	100
3/22/06	1	1727 High Trips		Supplies	$0.00		100	100										200	100	100
3/25/06	1	1727 High Trips	105	Order	$0.00	5	100	100	100	$0.00								100	100	100
3/28/06	2	1727 Low Trips		Supplies	$0.00		100	100										100	200	100
3/30/06	2	1727 Low Trips	106	Order	$0.00	5	100	100	100	$0.00								100	100	100
4/1/06	3	1727 Baby Trips	107	Order	$0.00	6	25	25	25	$0.00		0	0	0	0			100	100	75
4/4/06	3	1727 Baby Trips		Supplies	$0.00		25	25										100	100	100
4/10/06	3	1727 Baby Trips	108	Order	$0.00	1	25	25	25	$0.00		0	0	0	0			100	100	75
4/17/06	3	1727 Baby Trips		Supplies	$0.00		25	25			0							100	100	100
4/28/06	2	1727 Low Trips	109	Order	$0.00	5	25	25	25	$750.00		0	0	0	0			100	75	100
4/1/06	2	1727 Low Trips		Supplies	$0.00		25	25										100	100	100
5/29/06	3	1727 Baby Trips	110	Order	$0.00	2	50	50	50	$0.00		0	0	0	0			100	100	50
5/1/06	3	1727 Baby Trips		Supplies	$0.00		100	100				0	0	0	0			100	100	100
5/1/06	2	1727 Low Trips		Supplies	$0.00		50	50				0	0	0	0			100	100	100
5/2/06	3	1727 Baby Trips	111	Order	$0.00	5	50	50	50	$0.00		0	0	0	0			100	100	100
5/28/06	3	1727 Baby Trips	112	Order	$0.00	2	50	50	50	$0.00		0	0	0	0			100	100	50
6/30/06	2	1727 Low Trips	113	Order	$0.00	5	50	50	50	$0.00		0	0	0	0			100	50	50
6/27/06	2	1727 Low Trips	114	Order	$0.00	5	50	50	50	$0.00		0	0	0	0			100	50	50
7/1/06	2	1727 Low Trips		Supplies	$0.00		100	100				0	0	0	0			100	100	50
6/27/06	2	1727 Low Trips	115	Order	$0.00	5	50	50	50	$0.00		0	0	0	0			100	50	50
7/1/06	2	1727 Low Trips	116	Order	$0.00	5	50	0	0	$0.00		0	0	0	0			100	0	50
7/2/06	1	1727 High Trips	117	Order	$0.00	1	25	25	25	$0.00		0	0	0	0			75	0	50
7/2/06	3	1727 Baby Trips		Supplies	$0.00		100	100				0	0	0	0			75	0	100
7/2/06	2	1727 Low Trips		Supplies	$0.00		100	0				0	0	0	0			75	0	100
7/2/06	1	1727 High Trips		Supplies	$0.00		175	175				0	0	0	0			200	0	100
7/2/06	3	1727 Baby Trips	118	Order	$0.00	1	25	25	25	$0.00		0	0	0	0			200	0	100
7/4/06	2	1727 Low Trips		Backorders	$0.00		0	100				0	0	0	0			200	200	100

ACTIVITY 12
INVENTORY DATABASE CONTINUED

Transaction Date	Product No.	Product	PO No	Description	Price	Cust No	Purchases	Received	Sales	Total Sale	Shrinkage	HT Returns	HT Reason	LT Returns	LT Reason	BT Returns	BT Reason	HT On-Hand	LT On-Hand	BT On-Hand
8/3/99	1	TST High Tops	121	Order	$38.00	3	50	50	50	$1,900.00		0		0		0		125	100	125
8/15/99	2	TST Low Tops	122	Order	$28.00	4	25	25	25	$700.00		0		0		0		125	25	125
8/17/99	1	TST High Tops		Supplies	$8.00		100	100				0		0		0		225	25	125
8/30/99	2	TST Low Tops	123	Order	$28.00	6	25	25	25	$700.00		0		0		0		225	0	125
9/6/99	1	TST High Tops		Supplies	$8.00		25	25	25			0		0		0		250	0	125
9/10/99	2	TST Low Tops		Supplies	$28.00		500	500				0		0		0		250	500	125
9/10/99	1	TST High Tops		Supplies	$38.00		1000	1000				0		0		0		1250	500	125
9/10/99	3	TST Baby Tops		Supplies	$8.00		175	175				0		0		0		1250	500	300
9/11/99	1	TST High Tops	124	Order	$38.00	6	100	100	100	$3800.00		0		0		0		1150	500	300
9/13/99	1	TST High Tops	125	Order	$38.00	5	75	75	75	$2850.00		0		0		0		1100	500	300
9/15/99	1	TST High Tops	126	Order	$38.00	4	50	50	50	$1900.00		0		0		0		1050	500	300
9/16/99	1	TST High Tops	127	Order	$38.00	3	50	50	50	$1900.00		0		0		0		1000	500	300
9/18/99	2	TST Low Tops	128	Order	$28.00	2	50	50	50	$1400.00		0		0		0		1000	450	300
9/22/99	3	TST Baby Tops	129	Order	$8.00	1	50	50	50	$400.00		0		0		0		1000	450	250
9/28/99	2	TST Low Tops	130	Order	$28.00	5	25	25	25	$700.00		0		0		0		1000	425	250
10/1/99	3	TST Baby Tops	131	Order	$8.00	4	50	50	50	$400.00		0		0		0		1000	425	200
10/5/99	1	TST High Tops	132	Order	$38.00	3	25	25	25	$950.00		0		0		0		975	425	200
10/12/99	2	TST Low Tops	133	Order	$28.00	2	25	25	25	$700.00		0		0		0		975	400	200
10/14/99	2	TST Low Tops	134	Order	$28.00	1	50	50	50	$1400.00		0		0		0		975	350	200
10/16/99	2	TST Low Tops	135	Order	$28.00	6	25	25	25	$700.00		0		0		0		975	325	200
10/17/99	1	TST High Tops	136	Order	$38.00	1	11	11	11	$418.00		0		0		0		964	325	200
11/5/99	2	TST Low Tops	137	Order	$28.00	2	7	7	7	$196.00		0		0		0		964	318	200
11/5/99	1	TST High Tops	138	Order	$38.00	5	23	23	23	$874.00		0		0		0		941	318	200
11/18/99	3	TST Baby Tops	139	Order	$8.00	3	20	20	20	$160.00		0		0		0		941	318	180
11/23/99	2	TST Low Tops	140	Order	$28.00	4	34	34	34	$952.00		0		0		0		941	284	180
11/27/99	3	TST Baby Tops	141	Order	$8.00	2	15	15	15	$120.00		0		0		0		941	284	165
12/1/99	1	TST High Tops	142	Order	$38.00	3	57	57	57	$2166.00		0		0		0		884	284	165
12/1/99	3	TST Baby Tops	143	Order	$8.00	2	30	30	30	$240.00		0		0		0		884	284	135
12/1/99	2	TST Low Tops	144	Order	$28.00	4	34	34	34	$952.00		0		0		0		884	250	135
12/1/99	1	TST High Tops	145	Order	$38.00	5	23	23	23	$874.00		0		0		0		861	250	135
12/25/99	3	TST Baby Tops	146	Order	$8.00	2	25	25	25	$200.00		0		0		0		861	250	110

ACTIVITY 12 ASSESSMENT:

- Fill out the table below needed to calculate stock turnover. Inventory on Hand in dollars and Monthly Net Sales in dollars includes all three products.

Last 6 Months	Inventory on Hand in $	Monthly Net Sales in $
July	200*38 (7600) 100*28 (2800) 125*8 (1000) **$11400**	950+200= **$1150**
August	225*38 (8550) 0*28 (0) 125*8 (1000) **$9550**	1900+700+700 = **$3300**
September	1000*38 (38000) 425*28 (11900) 250*8 (2000) **$51900**	3800+2850+1900+1900+1400+400+700 = **$12950**
October	964*38 (36632) 325*28 (9100) 200*8 (1600) **$47332**	400+950+700+1400+700+418 = **$4568**
November	941*38 (35758) 284*28 (7952) 165*8 (1320) **$45030**	196+874+160+952+120 = **$2302**
December	861*38 (32718) 250*28 (7000) 110*8 (880) **$40598**	2166+240+952+874+200 = **$4432**
Total:	**$ 205810**	**$28702**

- Step 3: Calculate the Average Inventory on Hand:

$$\frac{\$\ 205810}{6} = \$\ 34301.67$$

- Step 4: Calculate the Stock Turnover Rate using the formula below:

$$\frac{\$28702.00}{\$34301.67}$$

Stock Turnover Rate for the last six months = .0837

- Step 5: What does the above stock turnover rate represent?
Stock turned over .849 times in one month. Did not turn over 1 time in 6 months.
It is critical to any retail business because it helps control costs. A store that manages its inventory efficiently keeps just enough stock on hand to satisfy customers' wants. Need to increase sales. There is too much inventory at times.

Manage Inventory

Activity 13

Learner Outcome

E6. Manage Inventory

Competencies

E6b. Maintain stock control records

Show-Me Standards

Knowledge: addition, subtraction, multiplication and division; other number sense, including numeration and estimation; and the application of these operations and concepts in the workplace and other situations.

Performance: (1.4) use technological tools and other resources to locate, select and organize information.
(1.9) assess costs, benefits and other consequences of proposed solutions

Objective

Students will be able to update inventory records based on the stock ordered versus stock sold for customers to determine the number of defects and missing stock.

Activity 13

- Step 1: Retrieve the Inventory Database form.

- Step 2: Analyze the stock ordered on the inventory database to determine number of defects or missing stock in original order on Customer Purchases Database Forms (High Top Purchases, Low Top Purchases, Baby Top Purchases.) versus the inventory database.

- Step 3: Update the inventory database by adjusting stock for defects and missing stock.

Database Applications for Marketing and Cooperative Education
Marketing Operations and Selling Units

ACTIVITY 13
INVENTORY DATABASE

Transaction Date	Product No.	Product	PONo	Description	Price	Customer No.	Purchases	Purchases	Sales	Total Sale	Shrinkage	ITRetail	ITReason	LTRetail	LTReason	BTRetail	BTReason	HTOnHand	LTOnHand	BTOnHand
1/1/99	1	TST High Tops		Supplies	$8.00		100	100										100	100	100
1/1/99	2	TST Low Tops		Supplies	$6.00		100	100										100	100	100
1/1/99	3	TST Baby Tops		Supplies	$2.00		100	100										100	100	100
1/12/99	3	TST Baby Tops	99	Order	$8.00	1	7	7	7	$56.00								100	100	93
1/15/99	1	TST High Tops	100	Order	$38.00	2	34	34	34	$1,292.00								66	100	93
1/30/99	2	TST Low Tops	131	Order	$28.00	3	20	20	20	$560.00								66	80	93
2/2/99	3	TST Baby Tops	102	Order	$8.00	4	23	23	23	$32.00								66	80	70
2/10/99	2	TST Low Tops	103	Order	$28.00	5	28	28	28	$784.00								66	58	70
2/25/99	3	TST Baby Tops		Supplies	$2.00		230	230										66	58	300
3/2/99	1	TST High Tops		Supplies	$8.00		42	42										100	58	300
3/10/99	3	TST Baby Tops	104	Order	$8.00	6	200	200	200	$1600.00								100	58	100
3/21/99	2	TST Low Tops		Supplies	$6.00		30	30										100	100	100
3/22/99	1	TST High Tops		Supplies	$8.00		100	100										200	100	100
3/25/99	1	TST High Tops	105	Order	$38.00	4	100	100	100	$3800.00								100	100	100
3/28/99	2	TST Low Tops		Supplies	$6.00		100	100										100	200	100
3/30/99	2	TST Low Tops	106	Order	$28.00	6	100	100	100	$2800.00								100	100	100
4/1/99	3	TST Baby Tops	107	Order	$8.00	4	25	25	25	$200.00		0		0		0		100	100	75
4/4/99	3	TST Baby Tops		Supplies	$2.00		25	25										100	100	100
4/15/99	3	TST Baby Tops	108	Order	$8.00	1	25	25	25	$200.00		0		0		0		100	100	75
4/17/99	3	TST Baby Tops		Supplies	$2.00		25	25			2							100	100	100
4/28/99	2	TST Low Tops	109	Order	$28.00	3	25	25	25	$700.00		0		0		0		100	75	100
5/1/99	2	TST Low Tops		Supplies	$6.00		25	25										100	100	100
5/28/99	3	TST Baby Tops	110	Order	$8.00	2	50	50	50	$400.00		0		0		0		100	100	50
6/1/99	3	TST Baby Tops		Supplies	$2.00		100	100				0		0		0		100	100	150
6/1/99	2	TST Low Tops		Supplies	$6.00		50	50				0		0		0		100	150	150
6/3/99	3	TST Baby Tops	111	Order	$8.00	3	50	50	50	$400.00		0		0		0		100	100	100
6/8/99	3	TST Baby Tops	112	Order	$8.00	2	50	50	50	$400.00		0		0		0		100	100	50
6/18/99	2	TST Low Tops	113	Order	$28.00	4	50	50	50	$1,400.00		0		0		0		100	50	50
6/21/99	2	TST Low Tops	114	Order	$28.00	6	50	50	50	$1,400.00		0		0		0		100	0	50
6/22/99	2	TST Low Tops		Supplies	$6.00		100	100				0		0		0		100	100	50
6/27/99	2	TST Low Tops	115	Order	$28.00	5	50	50	50	$1,400.00		0		0		0		100	50	50
7/1/99	2	TST Low Tops	116	Order	$28.00	6	50	0	0	$0.00		0		0		0		100	0	50
7/2/99	1	TST High Tops	117	Order	$38.00	1	25	25	25	$950.00		0		0		0		75	0	50
7/2/99	3	TST Baby Tops		Supplies	$2.00		100	100				0		0		0		75	0	150
7/2/99	2	TST Low Tops		Supplies	$6.00		100	0				0		0		0		75	0	150
7/2/99	1	TST High Tops		Supplies	$8.00		175	175				0		0		0		200	0	150
7/3/99	3	TST Baby Tops	118	Order	$8.00	2	25	25	25	$200.00		0		0		0		200	0	125
7/3/99	2	TST Low Tops		BackSupplies	$6.00		0	100				0		0		0		200	100	125

ACTIVITY 13
INVENTORY DATABASE CONTINUED

Transaction Date	Product No.	Product	PO No	Description	Price	Cust No	Purchases	Received	Sales	Total Sale	Shrinkage	HT Returns	HT Reason	LT Returns	LT Reason	BT Returns	BT Reason	HT On-Hand	LT On-Hand	BT On-Hand
8/3/99	1	TST High Tops	121	Order	$38.00	3	50	50	50	$1,900.00		0		0		0		125	100	125
8/15/99	2	TST Low Tops	122	Order	$28.00	4	25	25	25	$700.00		0		0		0		125	25	125
8/17/99	1	TST High Tops		Supplies	$8.00		100	100				0		0		0		225	25	125
8/30/99	2	TST Low Tops	123	Order	$28.00	6	25	25	25	$700.00		0		0		0		225	0	125
9/6/99	1	TST High Tops		Supplies	$8.00		25	25	25			0		0		0		250	0	125
9/10/99	2	TST Low Tops		Supplies	$28.00		500	500				0		0		0		250	500	125
9/10/99	1	TST High Tops		Supplies	$38.00		1000	1000				0		0		0		1250	500	125
9/10/99	3	TST Baby Tops		Supplies	$8.00		175	175				0		0		0		1250	500	300
9/11/99	1	TST High Tops	124	Order	$38.00	6	100	100	100	$3800.00		0		0		0		1150	500	300
9/13/99	1	TST High Tops	125	Order	$38.00	5	75	75	75	$2850.00		0		0		0		1100	500	300
9/15/99	1	TST High Tops	126	Order	$38.00	4	50	50	50	$1900.00		0		0		0		1050	500	300
9/16/99	1	TST High Tops	127	Order	$38.00	3	50	50	50	$1900.00		0		0		0		1000	500	300
9/18/99	2	TST Low Tops	128	Order	$28.00	2	50	50	50	$1400.00		0		0		0		1000	450	300
9/22/99	3	TST Baby Tops	129	Order	$8.00	1	50	50	50	$400.00		0		0		0		1000	450	250
9/28/99	2	TST Low Tops	130	Order	$28.00	5	25	25	25	$700.00		0		0		0		1000	425	250
10/1/99	3	TST Baby Tops	131	Order	$8.00	4	50	50	50	$400.00		0		0		0		1000	425	200
10/5/99	1	TST High Tops	132	Order	$38.00	3	25	25	25	$950.00		0		0		0		975	425	200
10/12/99	2	TST Low Tops	133	Order	$28.00	2	25	25	25	$700.00		0		0		0		975	400	200
10/14/99	2	TST Low Tops	134	Order	$28.00	1	50	50	50	$1400.00		0		0		0		975	350	200
10/16/99	2	TST Low Tops	135	Order	$28.00	6	25	25	25	$700.00		0		0		0		975	325	200
10/17/99	1	TST High Tops	136	Order	$38.00	1	11	11	11	$418.00		0		0		0		964	325	200
11/5/99	2	TST Low Tops	137	Order	$28.00	2	7	7	7	$196.00		0		0		0		964	318	200
11/5/99	1	TST High Tops	138	Order	$38.00	5	23	23	23	$874.00		0		0		0		941	318	200
11/18/99	3	TST Baby Tops	139	Order	$8.00	3	20	20	20	$160.00		0		0		0		941	318	180
11/23/99	2	TST Low Tops	140	Order	$28.00	4	34	34	34	$952.00		0		0		0		941	284	180
11/27/99	3	TST Baby Tops	141	Order	$8.00	2	15	15	15	$120.00		0		0		0		941	284	165
12/1/99	1	TST High Tops	142	Order	$38.00	3	57	57	57	$2166.00		0		0		0		884	284	165
12/1/99	3	TST Baby Tops	143	Order	$8.00	2	30	30	30	$240.00		0		0		0		884	284	135
12/1/99	2	TST Low Tops	144	Order	$28.00	4	34	34	34	$952.00		0		0		0		884	250	135
12/1/99	1	TST High Tops	145	Order	$38.00	5	23	23	23	$874.00		0		0		0		861	250	135
12/25/99	3	TST Baby Tops	146	Order	$8.00	2	25	25	25	$200.00		0		0		0		861	250	110

ACTIVITY 13 ANSWER KEY
INVENTORY DATABASE

Transaction Date	Product No.	Product	PONo	Description	Price	Customer No.	Purchased	Received	Sales	Total Sale	Shrinkage	HTRe-turns	HTReason	LTRe-turns	LTReason	BTRe-turns	BTReason	HTOn-Hand	LTOnHand	BTOnHand
1/1/99	1	TST High Tops		Supplies	$8.00		100	100										100	100	100
1/1/99	2	TST Low Tops		Supplies	$6.00		100	100										100	100	100
1/1/99	3	TST Baby Tops		Supplies	$2.00		100	100										100	100	100
1/12/99	3	TST Baby Tops	99	Order	$8.00	1	7	7	7	$56.00								100	100	93
1/15/99	1	TST High Tops	100	Order	$38.00	2	34	34	34	$1,292.00								66	100	93
1/30/99	2	TST Low Tops	131	Order	$28.00	3	20	20	20	$560.00								66	80	93
2/2/99	3	TST Baby Tops	102	Order	$8.00	4	23	23	23	$32.00								66	80	70
2/10/99	2	TST Low Tops	103	Order	$28.00	5	28	28	28	$784.00								66	58	70
2/25/99	3	TST Baby Tops		Supplies	$2.00		230	230										66	58	300
3/2/99	1	TST High Tops		Supplies	$8.00		42	42										100	58	300
3/10/99	3	TST Baby Tops	104	Order	$8.00	6	200	200	200	$1600.00								100	58	100
3/21/99	2	TST Low Tops		Supplies	$6.00		30	30										100	100	100
3/22/99	1	TST High Tops		Supplies	$8.00		100	100										200	100	100
3/25/99	1	TST High Tops	105	Order	$38.00	4	100	100	100	$3800.00								100	100	100
3/28/99	2	TST Low Tops		Supplies	$6.00		100	100										100	200	100
3/30/99	2	TST Low Tops	106	Order	$28.00	6	100	100	100	$2800.00								100	100	100
4/1/99	3	TST Baby Tops	107	Order	$8.00	4	25	25	25	$200.00			0		0		0	100	100	75
4/4/99	3	TST Baby Tops		Supplies	$2.00		25	25										100	100	100
4/15/99	3	TST Baby Tops	108	Order	$8.00	1	25	25	25	$200.00			0		0		0	100	100	75
4/17/99	3	TST Baby Tops		Supplies	$2.00		25	25			2							100	100	100
4/28/99	2	TST Low Tops	109	Order	$28.00	3	25	25	25	$700.00			0		0		0	100	75	100
5/1/99	2	TST Low Tops		Supplies	$6.00		25	25										100	100	100
5/28/99	3	TST Baby Tops	110	Order	$8.00	2	50	50	50	$400.00			0		0		0	100	100	50
6/1/99	3	TST Baby Tops		Supplies	$2.00		100	100					0		0		0	100	100	150
6/1/99	2	TST Low Tops		Supplies	$6.00		50	50					0		0		0	100	150	150
6/3/99	3	TST Baby Tops	111	Order	$8.00	3	50	50	50	$400.00			0		0		0	100	100	100
6/8/99	3	TST Baby Tops	112	Order	$8.00	2	50	50	50	$400.00			0		0		0	100	100	50
6/18/99	2	TST Low Tops	113	Order	$28.00	4	50	50	50	$1,400.00			0		0		0	100	50	50
6/21/99	2	TST Low Tops	114	Order	$28.00	6	50	50	50	$1,400.00			0		0		0	100	0	50
6/22/99	2	TST Low Tops		Supplies	$6.00		100	100					0		0		0	100	100	50
6/27/99	2	TST Low Tops	115	Order	$28.00	5	50	50	50	$1,400.00			0		0		0	100	50	50
7/1/99	2	TST Low Tops	116	Order	$28.00	6	50	0	0	$0.00			0		0		0	100	0	50
7/2/99	1	TST High Tops	117	Order	$38.00	1	25	25	25	$950.00			0		0		0	75	0	50
7/2/99	3	TST Baby Tops		Supplies	$2.00		100	100					0		0		0	75	0	150
7/2/99	2	TST Low Tops		Supplies	$6.00		100	0					0		0		0	75	0	150
7/2/99	1	TST High Tops		Supplies	$8.00		175	175					0		0		0	200	0	150
7/3/99	3	TST Baby Tops	118	Order	$8.00	2	25	25	25	$200.00			0		0		0	200	0	125
7/3/99	2	TST Low Tops		BackSupplies	$8.00		0	100					0		0		0	200	100	125

ACTIVITY 13 ANSWER KEY
INVENTORY DATABASE CONTINUED

Transaction Date	Product No.	Product	PO No	Description	Price	Cust No	Purchases	Received	Sales	Total Sale	Shrinkage	HT Returns	HT Reason	LT Returns	LT Reason	BT Returns	BT Reason	HT On-Hand	LT On-Hand	BT On-Hand
8/3/99	1	TST High Tops	121	Order	$38.00	3	50	50	50	$1,900.00		0		0		0		125	100	125
8/15/99	2	TST Low Tops	122	Order	$28.00	4	25	25	25	$700.00		0		0		0		125	25	125
8/17/99	1	TST High Tops		Supplies	$8.00		100	100				0		0		0		225	25	125
8/30/99	2	TST Low Tops	123	Order	$28.00	6	25	25	25	$700.00		0		0		0		225	0	125
9/6/99	1	TST High Tops		Supplies	$8.00		25	25	25			0		0		0		250	0	125
9/10/99	2	TST Low Tops		Supplies	$28.00		500	500				0		0		0		250	500	125
9/10/99	1	TST High Tops		Supplies	$38.00		1000	1000				0		0		0		1250	500	125
9/10/99	3	TST Baby Tops		Supplies	$8.00		175	175				0		0		0		1250	500	300
9/11/99	1	TST High Tops	124	Order	$38.00	6	100	100	100	$3800.00		0		0		0		1150	500	300
9/13/99	1	TST High Tops	125	Order	$38.00	5	75	75	75	$2850.00		0		0		0		1100	500	300
9/15/99	1	TST High Tops	126	Order	$38.00	4	50	50	50	$1900.00		0		0		0		1050	500	300
9/16/99	1	TST High Tops	127	Order	$38.00	3	50	50	50	$1900.00		0		0		0		1000	500	300
9/18/99	2	TST Low Tops	128	Order	$28.00	2	50	50	50	$1400.00		0		0		0		1000	450	300
9/22/99	3	TST Baby Tops	129	Order	$6.00	1	50	50	50	$400.00		0		0		0		1000	450	250
9/28/99	2	TST Low Tops	130	Order	$28.00	5	25	25	25	$700.00		0		0		0		1000	425	250
10/1/99	3	TST Baby Tops	131	Order	$8.00	4	50	50	50	$400.00		0		0		0		1000	425	200
10/5/99	1	TST High Tops	132	Order	$38.00	3	25	25	25	$950.00		0		0		0		975	425	200
10/12/99	2	TST Low Tops	133	Order	$28.00	2	25	25	25	$700.00		0		0		0		975	400	200
10/14/99	2	TST Low Tops	134	Order	$28.00	1	50	50	50	$1400.00		0		0		0		975	350	200
10/16/99	2	TST Low Tops	135	Order	$28.00	6	25	25	25	$700.00		0		0		0		975	325	200
10/17/99	1	TST High Tops	136	Order	$38.00	1	11	11	11	$418.00		0		0		0		964	325	200
11/5/99	2	TST Low Tops	137	Order	$28.00	2	7	7	7	$196.00		0		0		0		964	318	200
11/5/99	1	TST High Tops	138	Order	$38.00	5	23	23	23	$874.00		0		0		0		941	318	200
11/18/99	3	TST Baby Tops	139	Order	$8.00	3	20	20	20	$160.00		0		0		0		941	318	180
11/23/99	2	TST Low Tops	140	Order	$28.00	4	34	34	34	$952.00		0		0		0		941	284	180
11/27/99	3	TST Baby Tops	141	Order	$8.00	2	15	15	15	$120.00		0		0		0		941	284	165
12/1/99	1	TST High Tops	142	Order	$38.00	3	57	57	57	$2166.00		0		0		0		884	284	165
12/1/99	3	TST Baby Tops	143	Order	$8.00	2	30	30	30	$240.00		0		0		0		884	284	135
12/1/99	2	TST Low Tops	144	Order	$28.00	4	34	34	34	$952.00		0		0		0		884	250	135
12/1/99	1	TST High Tops	145	Order	$38.00	5	23	23	23	$874.00		0		0		0		861	250	135
12/25/99	3	TST Baby Tops	146	Order	$8.00	2	25	25	25	$200.00		0		0		0		861	250	110
12/27/99	1	TST High Tops		Return						$0.00		2	Defect	0		0		859	250	110
12/29/99	1	TST High Tops		Return						$0.00		1	Defect	0		0		858	250	110
12/29/99	3	TST Baby Tops		Return						$0.00		0		0		1	Wrong Item	858	250	109
12/30/99	1	TST High Tops		Return						$0.00		4	Defect	0		0		854	250	109

Manage Inventory

Activity 14

Learner Outcome

E6. Manage Inventory

Competencies

E6f. Check incoming stock and complete stock control records

Show-Me Standards

Knowledge: (CA1) speaking and writing standard English (including grammar, usage, punctuation, spelling, capitalization).
(MA1) addition, subtraction, multiplication and division; other number sense, including numeration and estimation; and the application of these operations and concepts in the workplace and other situations.

Performance: (2.1) plan and make written, oral and visual presentations for a variety of purposes and audiences.
(1.4) use technological tools and other resources to locate, select and organize information.
(1.9) assess costs, benefits and other consequences of proposed solutions

Objective

Students will be able to check inventory records to determine seasonal discounts for customers.

Activity 14

- Step 1: Retrieve the Inventory Database.
- Step 2: Analyze the inventory database to determine when seasonal discounts should be given to our customers.
- Step 3: Fill out the table below based on this information:

HIGH TOP SEASONAL PURCHASES:

	Winter (Dec-Feb)	Spring (Mar-May)	Summer (June-Aug)	Fall (Sept-Nov)
No. Of Cust.#1 Purchases				
No. Of Cust.#2 Purchases				
No. Of Cust.#3 Purchases				
No. Of Cust.#4 Purchases				
No. Of Cust.#5 Purchases				
No. Of Cust.#6 Purchases				
TOTAL PER SEASON:				

Activity 14

LOW TOP SEASONAL PURCHASES:

	Winter (Dec-Feb)	Spring (Mar-May)	Summer (June-Aug)	Fall (Sept-Nov)
No. Of Cust.#1 Purchases				
No. Of Cust.#2 Purchases				
No. Of Cust.#3 Purchases				
No. Of Cust.#4 Purchases				
No. Of Cust.#5 Purchases				
No. Of Cust.#6 Purchases				
TOTAL PER SEASON:				

BABY TOP SEASONAL PURCHASES:

	Winter (Dec-Feb)	Spring (Mar-May)	Summer (June-Aug)	Fall (Sept-Nov)
No. Of Cust.#1 Purchases				
No. Of Cust.#2 Purchases				
No. Of Cust.#3 Purchases				
No. Of Cust.#4 Purchases				
No. Of Cust.#5 Purchases				
No. Of Cust.#6 Purchases				
TOTAL PER SEASON:				

ACTIVITY 14
INVENTORY DATABASE

Transaction Date	Product No.	Product	Order	Description	Price	Order Line No.	Beg. On Hand	End. On Hand	Units Sold	Total Sales	Damaged	Returns	Returns	Returns	Returns	Returns	Returns	MTD On Hand	LTD Units	STD Units
1/1/99	1	TST High Tops		Supplies	$8.00		100	100										100	100	100
1/1/99	2	TST Low Tops		Supplies	$6.00		100	100										100	100	100
1/1/99	3	TST Baby Tops		Supplies	$2.00		100	100										100	100	100
1/12/99	3	TST Baby Tops	99	Order	$8.00	1	7	7	7	$56.00								100	100	93
1/15/99	1	TST High Tops	100	Order	$38.00	2	34	34	34	$1,292.00								66	100	93
1/30/99	2	TST Low Tops	131	Order	$28.00	3	20	20	20	$560.00								66	80	93
2/2/99	3	TST Baby Tops	102	Order	$8.00	4	23	23	23	$32.00								66	80	70
2/10/99	2	TST Low Tops	103	Order	$28.00	5	28	28	28	$784.00								66	58	70
2/25/99	3	TST Baby Tops		Supplies	$2.00		230	230										66	58	300
3/2/99	1	TST High Tops		Supplies	$8.00		42	42										100	58	300
3/10/99	3	TST Baby Tops	104	Order	$8.00	6	200	200	200	$1600.00								100	58	100
3/21/99	2	TST Low Tops		Supplies	$6.00		30	30										100	100	100
3/22/99	1	TST High Tops		Supplies	$8.00		100	100										200	100	100
3/25/99	1	TST High Tops	105	Order	$38.00	4	100	100	100	$3800.00								100	100	100
3/28/99	2	TST Low Tops		Supplies	$6.00		100	100										100	200	100
3/30/99	2	TST Low Tops	106	Order	$28.00	6	100	100	100	$2800.00								100	100	100
4/1/99	3	TST Baby Tops	107	Order	$8.00	4	25	25	25	$200.00		0		0		0		100	100	75
4/4/99	3	TST Baby Tops		Supplies	$2.00		25	25										100	100	100
4/15/99	3	TST Baby Tops	108	Order	$8.00	1	25	25	25	$200.00		0		0		0		100	100	75
4/17/99	3	TST Baby Tops		Supplies	$2.00		25	25			2							100	100	100
4/28/99	2	TST Low Tops	109	Order	$28.00	3	25	25	25	$700.00		0		0		0		100	75	100
5/1/99	2	TST Low Tops		Supplies	$6.00		25	25										100	100	100
5/28/99	3	TST Baby Tops	110	Order	$8.00	2	50	50	50	$400.00		0		0		0		100	100	50
6/1/99	3	TST Baby Tops		Supplies	$2.00		100	100				0		0		0		100	100	150
6/1/99	2	TST Low Tops		Supplies	$6.00		50	50				0		0		0		100	150	150
6/3/99	3	TST Baby Tops	111	Order	$8.00	3	50	50	50	$400.00		0		0		0		100	100	100
6/8/99	3	TST Baby Tops	112	Order	$8.00	2	50	50	50	$400.00		0		0		0		100	100	50
6/18/99	2	TST Low Tops	113	Order	$28.00	4	50	50	50	$1,400.00		0		0		0		100	50	50
6/21/99	2	TST Low Tops	114	Order	$28.00	6	50	50	50	$1,400.00		0		0		0		100	0	50
6/22/99	2	TST Low Tops		Supplies	$6.00		100	100				0		0		0		100	100	50
6/27/99	2	TST Low Tops	115	Order	$28.00	5	50	50	50	$1,400.00		0		0		0		100	50	50
7/1/99	2	TST Low Tops	116	Order	$28.00	6	50	0	0	$0.00		0		0		0		100	0	50
7/2/99	1	TST High Tops	117	Order	$38.00	1	25	25	25	$950.00		0		0		0		75	0	50
7/2/99	3	TST Baby Tops		Supplies	$2.00		100	100				0		0		0		75	0	150
7/2/99	2	TST Low Tops		Supplies	$6.00		100	0				0		0		0		75	0	150
7/2/99	1	TST High Tops		Supplies	$8.00		175	175				0		0		0		200	0	150
7/3/99	3	TST Baby Tops	118	Order	$8.00	2	25	25	25	$200.00		0		0		0		200	0	125
7/3/99	2	TST Low Tops		BackSupplies	$6.00		0	100				0		0		0		200	100	125

ACTIVITY 14
INVENTORY DATABASE CONTINUED

Transaction Date	Product No.	Product	PO No	Description	Price	Cust No	Purchased	Received	Sale #	Total Sale	Shrink Age	HT Returns	HT Reason	LT Returns	LT Reason	BT Returns	BT Reason	HT On-Hand	LT On-Hand	BT On-Hand
8/3/99	1	TST High Tops	121	Order	$38.00	3	50	50	50	$1,900.00		0		0		0		125	100	125
8/15/99	2	TST Low Tops	122	Order	$28.00	4	25	25	25	$700.00		0		0		0		125	25	125
8/17/99	1	TST High Tops		Supplies	$8.00		100	100				0		0		0		225	25	125
8/30/99	2	TST Low Tops	123	Order	$28.00	6	25	25	25	$700.00		0		0		0		225	0	125
9/6/99	1	TST High Tops		Supplies	$8.00		25	25	25			0		0		0		250	0	125
9/10/99	2	TST Low Tops		Supplies	$28.00		500	500				0		0		0		250	500	125
9/10/99	1	TST High Tops		Supplies	$38.00		1000	1000				0		0		0		1250	500	125
9/10/99	3	TST Baby Tops		Supplies	$8.00		175	175				0		0		0		1250	500	300
9/11/99	1	TST High Tops	124	Order	$38.00	6	100	100	100	$3800.00		0		0		0		1150	500	300
9/13/99	1	TST High Tops	125	Order	$38.00	5	75	75	75	$2850.00		0		0		0		1100	500	300
9/15/99	1	TST High Tops	126	Order	$38.00	4	50	50	50	$1900.00		0		0		0		1050	500	300
9/16/99	1	TST High Tops	127	Order	$38.00	3	50	50	50	$1900.00		0		0		0		1000	500	300
9/18/99	2	TST Low Tops	128	Order	$28.00	2	50	50	50	$1400.00		0		0		0		1000	450	300
9/22/99	3	TST Baby Tops	129	Order	$8.00	1	50	50	50	$400.00		0		0		0		1000	450	250
9/28/99	2	TST Low Tops	130	Order	$28.00	5	25	25	25	$700.00		0		0		0		1000	425	250
10/1/99	3	TST Baby Tops	131	Order	$8.00	4	50	50	50	$400.00		0		0		0		1000	425	200
10/5/99	1	TST High Tops	132	Order	$38.00	3	25	25	25	$950.00		0		0		0		975	425	200
10/12/99	2	TST Low Tops	133	Order	$28.00	2	25	25	25	$700.00		0		0		0		975	400	200
10/14/99	2	TST Low Tops	134	Order	$28.00	1	50	50	50	$1400.00		0		0		0		975	350	200
10/16/99	2	TST Low Tops	135	Order	$28.00	6	25	25	25	$700.00		0		0		0		975	325	200
10/17/99	1	TST High Tops	136	Order	$38.00	1	11	11	11	$418.00		0		0		0		964	325	200
11/5/99	2	TST Low Tops	137	Order	$28.00	2	7	7	7	$196.00		0		0		0		964	318	200
11/5/99	1	TST High Tops	138	Order	$38.00	5	23	23	23	$874.00		0		0		0		941	318	200
11/18/99	3	TST Baby Tops	139	Order	$8.00	3	20	20	20	$160.00		0		0		0		941	318	180
11/23/99	2	TST Low Tops	140	Order	$28.00	4	34	34	34	$952.00		0		0		0		941	284	180
11/27/99	3	TST Baby Tops	141	Order	$8.00	2	15	15	15	$120.00		0		0		0		941	284	165
12/1/99	1	TST High Tops	142	Order	$38.00	3	57	57	57	$2166.00		0		0		0		884	284	165
12/1/99	3	TST Baby Tops	143	Order	$8.00	2	30	30	30	$240.00		0		0		0		884	284	135
12/1/99	2	TST Low Tops	144	Order	$28.00	4	34	34	34	$952.00		0		0		0		884	250	135
12/1/99	1	TST High Tops	145	Order	$38.00	5	23	23	23	$874.00		0		0		0		861	250	135
12/25/99	3	TST Baby Tops	146	Order	$8.00	2	25	25	25	$200.00		0		0		0		861	250	110
12/27/99	1	TST High Tops		Return						$0.00		2	Defect	0		0		859	250	110
12/29/99	1	TST High Tops		Return						$0.00		1	Defect	0		0		858	250	110
12/29/99	3	TST Baby Tops		Return						$0.00		0		0		1	Wrong Item	858	250	109
12/30/99	1	TST High Tops		Return						$0.00		4	Defect	0		0		854	250	109

ACTIVITY 14 ASSESSMENT:

- Fill out the table below based on this information:

HIGH TOP SEASONAL PURCHASES:

	Winter (Dec-Feb)	Spring (Mar-May)	Summer (June-Aug)	Fall (Sept-Nov)
No. Of Cust.#1 Purchases	0	0	25	11
No. Of Cust.#2 Purchases	34	0	0	0
No. Of Cust.#3 Purchases	57	0	50	75
No. Of Cust.#4 Purchases	0	0	0	50
No. Of Cust.#5 Purchases	23	0	0	98
No. Of Cust.#6 Purchases	0	100	0	100
TOTAL PER SEASON:	**114**	**100**	**75**	**334**

LOW TOP SEASONAL PURCHASES:

	Winter (Dec-Feb)	Spring (Mar-May)	Summer (June-Aug)	Fall (Sept-Nov)
No. Of Cust.#1 Purchases	0	0	0	50
No. Of Cust.#2 Purchases	0	0	0	82
No. Of Cust.#3 Purchases	20	25	0	0
No. Of Cust.#4 Purchases	34	0	75	34
No. Of Cust.#5 Purchases	28	0	50	25
No. Of Cust.#6 Purchases	0	100	125	25
TOTAL PER SEASON:	**82**	**125**	**300**	**216**

BABY TOP SEASONAL PURCHASES:

	Winter (Dec-Feb)	Spring (Mar-May)	Summer (June-Aug)	Fall (Sept-Nov)
No. Of Cust.#1 Purchases	7	25	0	50
No. Of Cust.#2 Purchases	55	50	75	15
No. Of Cust.#3 Purchases	0	0	50	20
No. Of Cust.#4 Purchases	23	25	0	50
No. Of Cust.#5 Purchases	0	0	0	0
No. Of Cust.#6 Purchases	0	200	0	0
TOTAL PER SEASON:	**85**	**300**	**125**	**135**

- Which season demands better marketing strategies per product?

  High Tops: FALL
  Low Tops: SUMMER
  Baby Tops: SPRING

TENNIS SHOE TOWN
Marketing & Cooperative Education
Database Application Unit

SELLING
DATABASE APPLICATIONS
SECTION

Conduct Sales Presentations

Activity 15

Learner Outcome

H2. Conduct a Sales Presentation

Competencies

H2e. Present the features and benefits of a product or service.

Show-Me Standards

Knowledge: (CA1) speaking and writing standard English (including grammar, usage, punctuation, spelling, capitalization).

Performance: (2.1) plan and make written, oral and visual presentations for a variety of purposes and audiences.

Objective

Students will be able to create a direct mail advertisement based on a target marget.

Activity 15

- Step 1: Retrieve the Customer Purchase Databases (High Tops, Low Tops and Baby Tops).
- Step 2: Analyze the Customer Purchase Database forms to determine customer product preferences.
- Step 3: Summarize your findings below:

Customer:	No. of High Top Purchases:	No. of Low Top Purchases:	No. of Baby Top Purchases:	Top Shoe Sales:
No. 1				
No. 2				
No. 3				
No. 4				
No. 5				
No. 6				

- Step 4: Create a direct mail advertisement letter to all of our valued customers based on the their product preferences.
- Step 5: Turn in the six direct mail advertisement letters for assessment.

ACTIVITY 9 CUSTOMER PURCHASE DATABASES

HIGH TOP PURCHASES

Cust No.	CustCo	Total UnitsSold	Price	Discount	TotalAmt-Sold	High Top Returns	High Top Reason
1	Yorres Shoes	36	$38.00	1/10 net 30	$1368.00	2	due to defects
2	Phillips Shoes	34	$38.00	3/10 net 30	$1292.00	0	
3	Wilson Shoes	182	$38.00	2/10 net 30	$6916.00	1	due to defect
4	Jones Shoes	150	$38.00	1/10 net 15	$5700.00	0	
5	Smith Shoes	121	$38.00	1/10 net 15	$4598.00	4	due to defect
6	James Shoes	100	$38.00	none	$3800.00	0	

LOW TOP PURCHASES

Cust No.	CustCo	Total UnitsSold	Price	Discount	TotalAmt-Sold	Low Top Returns	Low Top Reason
1	Yorres Shoes	50	$28.00	1/10 net 30	$1400.00	0	
2	Phillips Shoes	82	$28.00	3/10 net 30	$2296.00	0	
3	Wilson Shoes	45	$28.00	2/10 net 30	$1260.00	0	
4	Jones Shoes	143	$28.00	1/10 net 15	$4004.00	0	
5	Smith Shoes	103	$28.00	1/10 net 15	$2884.00	0	
6	James Shoes	250	$28.00	none	$7000.00	0	

BABY TOP PURCHASES

Cust No.	CustCo	Total UnitsSold	Price	Discount	TotalAmt-Sold	Baby Top Returns	Baby Top Reason
1	Yorres Shoes	82	$8.00	1/10 net 30	$656.00	0	
2	Phillips Shoes	170	$8.00	3/10 net 30	$1360.00	0	
3	Wilson Shoes	70	$8.00	2/10 net 30	$400.00	0	
4	Jones Shoes	98	$8.00	1/10 net 15	$784.00	1	Wrong item shipped.
5	Smith Shoes	0	$8.00	1/10 net 15	$0	0	
6	James Shoes	200	$8.00	none	$1600.00	0	

ACTIVITY 15 ASSESSMENT:

Customer:	No. of High Top Purchases:	No. of Low Top Purchases:	No. of Baby Top Purchases:	Top Shoe Sales:
No. 1	36	50	82	Baby Top
No. 2	34	82	170	Baby Top
No. 3	182	45	70	High Top
No. 4	150	143	98	High Top
No. 5	121	103	0	High Top
No. 6	100	250	200	Low Top

ACTIVITY 15 ASSESSMENT:

For each statement listed below, assign a rating for the letters to be evaluated based on the following scale:

- **Excellent:** the student successfully completed the activity with all required items with no assistance.
- **Good**: the student completed the activity with all items; required some assistance from the teacher.
- **Poor:** the student completed the activity with 2 or more items missing from the letters; teacher assistance was necessary to complete letters.
- **Not Acceptable:** the student did not complete the activity; three or more items missing from letters.

Excellent/ Good	Poor/Not Acceptable	Activity Requirement	Comments
(25 – 19 pts)	(18 – 0 pts)	Letter presented clear and concise information to improve customer relations. (0 to 15 pts)	
(10 – 6 pts)	(5 – 0 pts)	Letter was error-free and of high quality. (0 to 10 pts)	
(5 – 3 pts)	(2 – 0 pts)	Information was readable, timely, and accurate. (0 to 5 pts)	
Total Points ___/40			

Utilize Specialized Selling Techniques

Activity 16

Learner Outcome

H4. Utilize specialized selling techniques

Competencies

H4d. Suggest larger quantities, higher priced goods, and additional goods in an effort to increase the average sale

Show-Me Standards

Performance: (3.8) assess costs, benefits and other consequences of proposed solutions.

Objective

Students will be able to analyze sales to determine how to increase sales.

Activity 16

- Step 1: Retrieve the Inventory Database.

- Step 2: Figure below the average number of units of High Tops, Low Tops and Baby Tops sold per month by Tennis Shoe Town:

Total Amount of High Top Sales in Units: _____
Total Amount of Low Top Sales in Units: _____
Total Amount of Baby Top Sales in Units: _____

Average High Top Units Sold per Month: _____
Average Low Top Units Sold per Month: _____
Average Baby Top Units Sold per Month: _____

- Step 4: Turn in your answers for assessment.

Database Applications for Marketing and Cooperative Education
Marketing Operations and Selling Units

ACTIVITY 16
INVENTORY DATABASE

Transaction Date	Product No.	Product	PONo	Description	Price	Quantity	Purchased	Received	Sales	Total Sale	Shrinkage	HTReturns	HTReason	LTReturns	LTReason	BTReturns	BTReason	HTOnHand	LTOnHand	BTOnHand
1/1/99	1	TST High Tops		Supplies	$8.00		100	100										100	100	100
1/1/99	2	TST Low Tops		Supplies	$6.00		100	100										100	100	100
1/1/99	3	TST Baby Tops		Supplies	$2.00		100	100										100	100	100
1/12/99	3	TST Baby Tops	99	Order	$8.00	1	7	7	7	$56.00								100	100	93
1/15/99	1	TST High Tops	100	Order	$38.00	2	34	34	34	$1,292.00								66	100	93
1/30/99	2	TST Low Tops	131	Order	$28.00	3	20	20	20	$560.00								66	80	93
2/2/99	3	TST Baby Tops	102	Order	$8.00	4	23	23	23	$32.00								66	80	70
2/10/99	2	TST Low Tops	103	Order	$28.00	5	28	28	28	$784.00								66	58	70
2/25/99	3	TST Baby Tops		Supplies	$2.00		230	230										66	58	300
3/2/99	1	TST High Tops		Supplies	$8.00		42	42										100	58	300
3/10/99	3	TST Baby Tops	104	Order	$8.00	6	200	200	200	$1600.00								100	58	100
3/21/99	2	TST Low Tops		Supplies	$6.00		30	30										100	100	100
3/22/99	1	TST High Tops		Supplies	$8.00		100	100										200	100	100
3/25/99	1	TST High Tops	105	Order	$38.00	4	100	100	100	$3800.00								100	100	100
3/28/99	2	TST Low Tops		Supplies	$6.00		100	100										100	200	100
3/30/99	2	TST Low Tops	106	Order	$28.00	6	100	100	100	$2800.00								100	100	100
4/1/99	3	TST Baby Tops	107	Order	$8.00	4	25	25	25	$200.00		0		0		0		100	100	75
4/4/99	3	TST Baby Tops		Supplies	$2.00		25	25										100	100	100
4/15/99	3	TST Baby Tops	108	Order	$8.00	1	25	25	25	$200.00		0		0		0		100	100	75
4/17/99	3	TST Baby Tops		Supplies	$2.00		25	25			2							100	100	100
4/28/99	2	TST Low Tops	109	Order	$28.00	3	25	25	25	$700.00		0		0		0		100	75	100
5/1/99	2	TST Low Tops		Supplies	$6.00		25	25										100	100	100
5/28/99	3	TST Baby Tops	110	Order	$8.00	2	50	50	50	$400.00		0		0		0		100	100	50
6/1/99	3	TST Baby Tops		Supplies	$2.00		100	100				0		0		0		100	100	150
6/1/99	2	TST Low Tops		Supplies	$6.00		50	50				0		0		0		100	150	150
6/3/99	3	TST Baby Tops	111	Order	$8.00	3	50	50	50	$400.00		0		0		0		100	100	100
6/8/99	3	TST Baby Tops	112	Order	$8.00	2	50	50	50	$400.00		0		0		0		100	100	50
6/18/99	2	TST Low Tops	113	Order	$28.00	4	50	50	50	$1,400.00		0		0		0		100	50	50
6/21/99	2	TST Low Tops	114	Order	$28.00	6	50	50	50	$1,400.00		0		0		0		100	0	50
6/22/99	2	TST Low Tops		Supplies	$6.00		100	100				0		0		0		100	100	50
6/27/99	2	TST Low Tops	115	Order	$28.00	5	50	50	50	$1,400.00		0		0		0		100	50	50
7/1/99	2	TST Low Tops	116	Order	$28.00	6	50	0	0	$0.00		0		0		0		100	0	50
7/2/99	1	TST High Tops	117	Order	$38.00	1	25	25	25	$950.00		0		0		0		75	0	50
7/2/99	3	TST Baby Tops		Supplies	$2.00		100	100				0		0		0		75	0	150
7/2/99	2	TST Low Tops		Supplies	$6.00		100	0				0		0		0		75	0	150
7/2/99	1	TST High Tops		Supplies	$8.00		175	175				0		0		0		200	0	150
7/3/99	3	TST Baby Tops	118	Order	$8.00	2	25	25	25	$200.00		0		0		0		200	0	125
7/3/99	2	TST Low Tops		BackSupplies	$6.00		0	100				0		0		0		200	100	125

ACTIVITY 16
INVENTORY DATABASE CONTINUED

Transaction Date	Product No	Product	PO No	Description	Price	Cust No	Purchased	Received	Sales	Total Sale	Error	HT Returns	HT Reason	LT Returns	LT Reason	BT Returns	BT Reason	HT On-Hand	LT On-Hand	BT On-Hand
8/3/99	1	TST High Tops	121	Order	$38.00	3	50	50	50	$1,900.00		0		0		0		125	100	125
8/15/99	2	TST Low Tops	122	Order	$28.00	4	25	25	25	$700.00		0		0		0		125	25	125
8/17/99	1	TST High Tops		Supplies	$8.00		100	100				0		0		0		225	25	125
8/30/99	2	TST Low Tops	123	Order	$28.00	6	25	25	25	$700.00		0		0		0		225	0	125
9/6/99	1	TST High Tops		Supplies	$8.00		25	25	25			0		0		0		250	0	125
9/10/99	2	TST Low Tops		Supplies	$28.00		500	500				0		0		0		250	500	125
9/10/99	1	TST High Tops		Supplies	$38.00		1000	1000				0		0		0		1250	500	125
9/10/99	3	TST Baby Tops		Supplies	$8.00		175	175				0		0		0		1250	500	300
9/11/99	1	TST High Tops	124	Order	$38.00	8	100	100	100	$3800.00		0		0		0		1150	500	300
9/13/99	1	TST High Tops	125	Order	$38.00	5	75	75	75	$2850.00		0		0		0		1100	500	300
9/15/99	1	TST High Tops	126	Order	$38.00	4	50	50	50	$1900.00		0		0		0		1050	500	300
9/16/99	1	TST High Tops	127	Order	$38.00	3	50	50	50	$1900.00		0		0		0		1000	500	300
9/18/99	2	TST Low Tops	128	Order	$28.00	2	50	50	50	$1400.00		0		0		0		1000	450	300
9/22/99	3	TST Baby Tops	129	Order	$8.00	1	50	50	50	$400.00		0		0		0		1000	450	250
9/28/99	2	TST Low Tops	130	Order	$28.00	5	25	25	25	$700.00		0		0		0		1000	425	250
10/1/99	3	TST Baby Tops	131	Order	$8.00	4	50	50	50	$400.00		0		0		0		1000	425	200
10/5/99	1	TST High Tops	132	Order	$38.00	3	25	25	25	$950.00		0		0		0		975	425	200
10/12/99	2	TST Low Tops	133	Order	$28.00	2	25	25	25	$700.00		0		0		0		975	400	200
10/14/99	2	TST Low Tops	134	Order	$28.00	1	50	50	50	$1400.00		0		0		0		975	350	200
10/16/99	2	TST Low Tops	135	Order	$28.00	6	25	25	25	$700.00		0		0		0		975	325	200
10/17/99	1	TST High Tops	136	Order	$38.00	1	11	11	11	$418.00		0		0		0		964	325	200
11/5/99	2	TST Low Tops	137	Order	$28.00	2	7	7	7	$196.00		0		0		0		964	318	200
11/5/99	1	TST High Tops	138	Order	$38.00	5	23	23	23	$874.00		0		0		0		941	318	200
11/18/99	3	TST Baby Tops	139	Order	$8.00	3	20	20	20	$160.00		0		0		0		941	318	180
11/23/99	2	TST Low Tops	140	Order	$28.00	4	34	34	34	$952.00		0		0		0		941	284	180
11/27/99	3	TST Baby Tops	141	Order	$8.00	2	15	15	15	$120.00		0		0		0		941	284	165
12/1/99	1	TST High Tops	142	Order	$38.00	3	57	57	57	$2166.00		0		0		0		884	284	165
12/1/99	3	TST Baby Tops	143	Order	$8.00	2	30	30	30	$240.00		0		0		0		884	284	135
12/1/99	2	TST Low Tops	144	Order	$28.00	4	34	34	34	$952.00		0		0		0		884	250	135
12/1/99	1	TST High Tops	145	Order	$38.00	5	23	23	23	$874.00		0		0		0		861	250	135
12/25/99	3	TST Baby Tops	146	Order	$8.00	2	25	25	25	$200.00		0		0		0		861	250	110
12/27/99	1	TST High Tops		Return						$0.00		2	Defect	0		0		859	250	110
12/29/99	1	TST High Tops		Return						$0.00		1	Defect	0		0		858	250	110
12/29/99	3	TST Baby Tops		Return						$0.00		0		0		1	Wrong Item	858	250	109
12/30/99	1	TST High Tops		Return						$0.00		4	Defect	0		0		854	250	109

ACTIVITY 16 ASSESSMENT

Figure below the average number of units of High Tops, Low Tops and Baby Tops sold per month by Tennis Shoe Town:

Total Amount of High Top Sales in Units:	*623*
Total Amount of Low Top Sales in Units:	*673*
Total Amount of Baby Top Sales in Units:	*620*
Average High Top Units Sold per Month:	*623/12= 52*
Average Low Top Units Sold per Month:	*673/12= 56*
Average Baby Top Units Sold per Month:	*620/12= 52*

Utilize Specialized Selling Techniques

Activity 17

Learner Outcome

H4. Utilize specialized selling techniques

Competencies

H4e. Develop sales-incentive programs

Show-Me Standards

Performance: (1.8) organize data, information and ideas into useful forms (including charts, graphs, outlines) for analysis or presentation.
(2.1) plan and make written, oral and visual presentations for a variety of purposes and audiences.

Objective

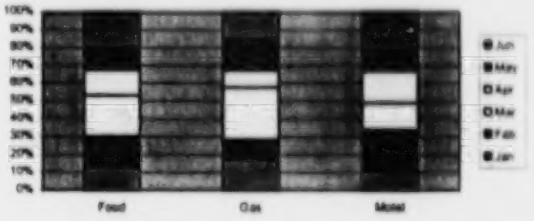
Students will be able to graphically illustrate the total sales of salespersons.

Activity 17

- Step 1: Retrieve the Inventory Database.
- Step 2: List below the lowest selling season for each product.

High Tops: _____
Low Tops: _____
Baby Tops: _____

- Step 3: Create a stacked bar graph which illustrates the amount of sales for each season per shoe.There should be three x-axis titles (high tops, low tops, baby tops) and four y-axis titles representing the seasons per shoe (fall, winter, spring, summer).
Note: an example of a stacked bar graph is below:



- Step 4: Turn in your stacked bar graph for assessment.

Activity 17

- Step 5: Write a sales incentive proposal for each salesperson based on the lowest seasons per shoe above. Include a title page, graphics and database information needed to analyze sales performance.
- Step 6: Turn in your sales incentive proposal for assessment.

Enrichment Activities:

- Create the above stacked bar graph using a spreadsheet software program. Print to color if available.
- Research the Internet for incentive trips to hotel resorts for the top 2 salespersons in the company. Select a city for each salesperson. Print information on the hotel resorts and their activities. Include this data in your sales proposal.

Database Applications for Marketing and Cooperative Education
Marketing Operations and Selling Units

ACTIVITY 17
INVENTORY DATABASE

Transaction Date	Product No.	Product	PONo	Description	Price	Quantity Sold	Beg Inventory	End Inventory	Receipts	Total Cost	Backorders	BTDate Sent	BTDate Received	LTDate Sent	LTReason	STDate Sent	STReason	BTOn-Hand	LTOn-Hand	STOn-Hand
1/1/99	1	TST High Tops		Supplies	$8.00		100	100										100	100	100
1/1/99	2	TST Low Tops		Supplies	$8.00		100	100										100	100	100
1/1/99	3	TST Baby Tops		Supplies	$2.00		100	100										100	100	100
1/12/99	3	TST Baby Tops	99	Order	$8.00	1	7	7	7	$56.00								100	100	93
1/15/99	1	TST High Tops	100	Order	$38.00	2	34	34	34	$1,292.00								66	100	93
1/30/99	2	TST Low Tops	131	Order	$28.00	3	20	20	20	$560.00								66	80	93
2/2/99	3	TST Baby Tops	102	Order	$8.00	4	23	23	23	$32.00								66	80	70
2/10/99	2	TST Low Tops	103	Order	$28.00	5	28	28	28	$784.00								66	58	70
2/25/99	3	TST Baby Tops		Supplies	$2.00		230	230										66	58	300
3/2/99	1	TST High Tops		Supplies	$8.00		42	42										100	58	300
3/10/99	3	TST Baby Tops	104	Order	$8.00	6	200	200	200	$1600.00								100	58	100
3/21/99	2	TST Low Tops		Supplies	$6.00		30	30										100	100	100
3/22/99	1	TST High Tops		Supplies	$8.00		100	100										200	100	100
3/25/99	1	TST High Tops	105	Order	$38.00	4	100	100	100	$3800.00								100	100	100
3/28/99	2	TST Low Tops		Supplies	$6.00		100	100										100	200	100
3/30/99	2	TST Low Tops	106	Order	$28.00	6	100	100	100	$2800.00								100	100	100
4/1/99	3	TST Baby Tops	107	Order	$8.00	4	25	25	25	$200.00		0		0		0		100	100	75
4/4/99	3	TST Baby Tops		Supplies	$2.00		25	25										100	100	100
4/15/99	3	TST Baby Tops	108	Order	$8.00	1	25	25	25	$200.00		0		0		0		100	100	75
4/17/99	3	TST Baby Tops		Supplies	$2.00		25	25			2							100	100	100
4/28/99	2	TST Low Tops	109	Order	$28.00	3	25	25	25	$700.00		0		0		0		100	75	100
5/1/99	2	TST Low Tops		Supplies	$6.00		25	25										100	100	100
5/28/99	3	TST Baby Tops	110	Order	$8.00	2	50	50	50	$400.00		0		0		0		100	100	50
6/1/99	3	TST Baby Tops		Supplies	$2.00		100	100				0		0		0		100	100	150
6/1/99	2	TST Low Tops		Supplies	$6.00		50	50				0		0		0		100	150	150
6/3/99	3	TST Baby Tops	111	Order	$8.00	3	50	50	50	$400.00		0		0		0		100	100	100
6/8/99	3	TST Baby Tops	112	Order	$8.00	2	50	50	50	$400.00		0		0		0		100	100	50
6/18/99	2	TST Low Tops	113	Order	$28.00	4	50	50	50	$1,400.00		0		0		0		100	50	50
6/21/99	2	TST Low Tops	114	Order	$28.00	6	50	50	50	$1,400.00		0		0		0		100	0	50
6/22/99	2	TST Low Tops		Supplies	$6.00		100	100				0		0		0		100	100	50
6/27/99	2	TST Low Tops	115	Order	$28.00	5	50	50	50	$1,400.00		0		0		0		100	50	50
7/1/99	2	TST Low Tops	116	Order	$28.00	6	50	0	0	$0.00		0		0		0		100	0	50
7/2/99	1	TST High Tops	117	Order	$38.00	1	25	25	25	$950.00		0		0		0		75	0	50
7/2/99	3	TST Baby Tops		Supplies	$2.00		100	100				0		0		0		75	0	150
7/2/99	2	TST Low Tops		Supplies	$6.00		100	0				0		0		0		75	0	150
7/2/99	1	TST High Tops		Supplies	$8.00		175	175				0		0		0		200	0	150
7/3/99	3	TST Baby Tops	118	Order	$8.00	2	25	25	25	$200.00		0		0		0		200	0	125
7/3/99	2	TST Low Tops		BackSupplies	$6.00		0	100				0		0		0		200	100	125

ACTIVITY 17
INVENTORY DATABASE CONTINUED

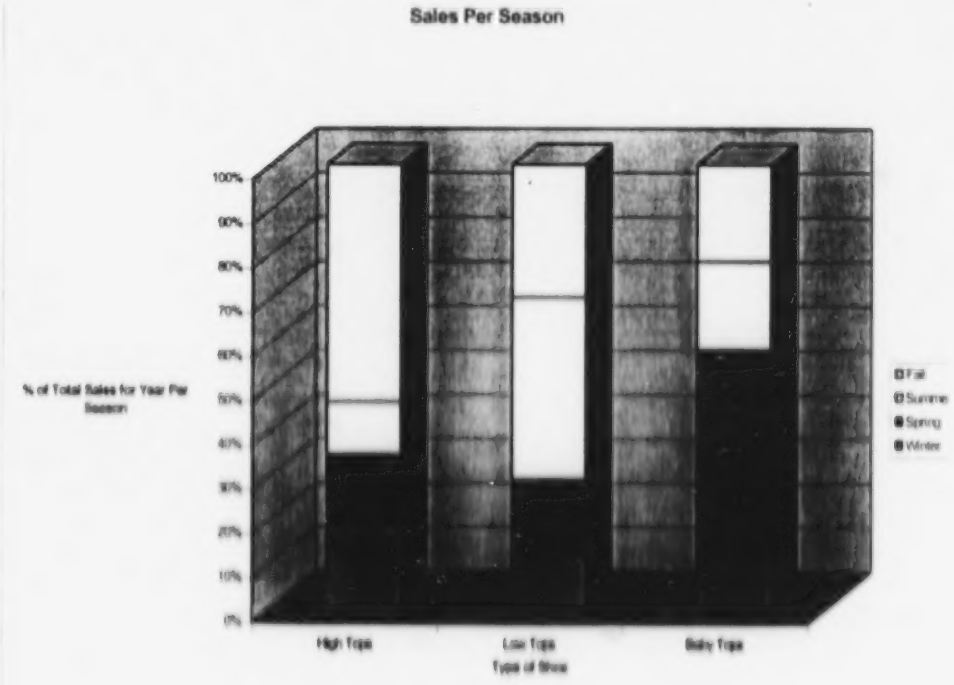
Transaction Date	Product No.	Product	PO No	Description	Price	Cust No	Purchased	Received	Sales	Total Sale	Shrink age	HT Returns	HT Reason	LT Returns	LT Reason	BT Returns	BT Reason	HT On-Hand	LT On-Hand	BT On-Hand
8/3/99	1	TST High Tops	121	Order	$38.00	3	50	50	50	$1,900.00		0		0		0		125	100	125
8/15/99	2	TST Low Tops	122	Order	$28.00	4	25	25	25	$700.00		0		0		0		125	25	125
8/17/99	1	TST High Tops		Supplies	$8.00		100	100				0		0		0		225	25	125
8/30/99	2	TST Low Tops	123	Order	$28.00	6	25	25	25	$700.00		0		0		0		225	0	125
9/6/99	1	TST High Tops		Supplies	$8.00		25	25	25			0		0		0		250	0	125
9/10/99	2	TST Low Tops		Supplies	$28.00		500	500				0		0		0		250	500	125
9/10/99	1	TST High Tops		Supplies	$38.00		1000	1000				0		0		0		1250	500	125
9/10/99	3	TST Baby Tops		Supplies	$8.00		175	175				0		0		0		1250	500	300
9/11/99	1	TST High Tops	124	Order	$38.00	6	100	100	100	$3800.00		0		0		0		1150	500	300
9/13/99	1	TST High Tops	125	Order	$38.00	5	75	75	75	$2850.00		0		0		0		1100	500	300
9/15/99	1	TST High Tops	126	Order	$38.00	4	50	50	50	$1900.00		0		0		0		1050	500	300
9/16/99	1	TST High Tops	127	Order	$38.00	3	50	50	50	$1900.00		0		0		0		1000	500	300
9/18/99	2	TST Low Tops	128	Order	$28.00	2	50	50	50	$1400.00		0		0		0		1000	450	300
9/22/99	3	TST Baby Tops	129	Order	$8.00	1	50	50	50	$400.00		0		0		0		1000	450	250
9/28/99	2	TST Low Tops	130	Order	$28.00	5	25	25	25	$700.00		0		0		0		1000	425	250
10/1/99	3	TST Baby Tops	131	Order	$8.00	4	50	50	50	$400.00		0		0		0		1000	425	200
10/5/99	1	TST High Tops	132	Order	$38.00	3	25	25	25	$950.00		0		0		0		975	425	200
10/12/99	2	TST Low Tops	133	Order	$28.00	2	25	25	25	$700.00		0		0		0		975	400	200
10/14/99	2	TST Low Tops	134	Order	$28.00	1	50	50	50	$1400.00		0		0		0		975	350	200
10/16/99	2	TST Low Tops	135	Order	$28.00	6	25	25	25	$700.00		0		0		0		975	325	200
10/17/99	1	TST High Tops	136	Order	$38.00	1	11	11	11	$418.00		0		0		0		964	325	200
11/5/99	2	TST Low Tops	137	Order	$28.00	2	7	7	7	$196.00		0		0		0		964	318	200
11/5/99	1	TST High Tops	138	Order	$38.00	5	23	23	23	$874.00		0		0		0		941	318	200
11/18/99	3	TST Baby Tops	139	Order	$8.00	3	20	20	20	$160.00		0		0		0		941	318	180
11/23/99	2	TST Low Tops	140	Order	$28.00	4	34	34	34	$952.00		0		0		0		941	284	180
11/27/99	3	TST Baby Tops	141	Order	$8.00	2	15	15	15	$120.00		0		0		0		941	284	165
12/1/99	1	TST High Tops	142	Order	$38.00	3	57	57	57	$2166.00		0		0		0		884	284	165
12/1/99	3	TST Baby Tops	143	Order	$8.00	2	30	30	30	$240.00		0		0		0		884	284	135
12/1/99	2	TST Low Tops	144	Order	$28.00	4	34	34	34	$952.00		0		0		0		884	250	135
12/1/99	1	TST High Tops	145	Order	$38.00	5	23	23	23	$874.00		0		0		0		861	250	135
12/25/99	3	TST Baby Tops	146	Order	$8.00	2	25	25	25	$200.00		0		0		0		861	250	110
12/27/99	1	TST High Tops		Return						$0.00		2	Defect	0		0		859	250	110
12/29/99	1	TST High Tops		Return						$0.00		1	Defect	0		0		858	250	110
12/29/99	3	TST Baby Tops		Return						$0.00		0		0		1	Wrong Item	858	250	109
12/30/99	1	TST High Tops		Return						$0.00		4	Defect	0		0		854	250	109

ACTIVITY 18 ASSESSMENT

List below the lowest selling season for each product.

High Tops: Summer
Low Tops: Winter
Baby Tops: Winter

Answers to the stacked bar graph are below:



Utilize Organizational Skills in Professional Selling

Activity 18

Learner Outcome

H5. Utilize organizational skills in professional selling

Competencies

H5c. Set and evaluate sales goals or quotas

Show-Me Standards

Performance: (3.8) assess costs, benefits and other consequences of proposed solutions.

Objective

Students will be able to develop sales strategies for salespersons based on company profit goals.

Activity 18

- Step 1: Retrieve the Employees Database Form
- Step 2: Fill in the following table to calculate amount of sales increases for next year per salesperson:

25% increase in sales from this year for 1-3 year salespersons.
15% increase in sales from this year for 4 or more years of sales at Tennis Shoe Town.

SALESPERSON:	No. of Years	% of Increase	Sales for the Year	Increase in $
Margaret Peacock			$100,000	
Andrew Fuller			$250,000	
Nancy Davalio			$50,000	
Janet Leverling			$75,000	
Steven Buchanan			$102,000	

ACTIVITY 18
EMPLOYEES DATABASE

Employee ID	First Name	Last Name	Title	Work Phone	CoYears
1	Nancy	Davolio	Salesperson	(573) 555-9857	1
2	Andrew	Fuller	Salesperson	(573) 555-9482	2
3	Janet	Leverling	Salesperson	(212) 555-3412	3
4	Margaret	Peacock	Salesperson	(212) 555-8122	4
5	Steven	Buchanan	Salesperson	(212) 555-1189	5

Utilize Organizational Skills in Professional Selling

ACTIVITY 18 ASSESSMENT

Fill in the following table to calculate amount of sales increases for next year per salesperson:

25% increase in sales from this year for 1-3 year salespersons.

15% increase in sales from this year for 4 or more years of sales at Tennis Shoe Town.

SALESPERSON:	No. of Years	% of Increase	Sales for the Year	Increase in $
Margaret Peacock	4	15%	$100,000	**$15000 = $115,000**
Andrew Fuller	2	25%	$250,000	**$62500 = $312,500**
Nancy Davalio	1	25%	$50,000	**$12500 = $ 62,500**
Janet Leverling	3	25%	$75,000	**$18750 = $ 93,750**
Steven Buchanan	5	15%	$102,000	**$15300 = $117,300**